

# **EXHIBIT B**

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**From:** Somerville, Amy  
**Sent:** Wednesday, April 30, 2014 2:52 PM  
**To:** Kramig, Tom  
**Subject:** agent modules  
**Attachments:** Abundant Agent Expired.docx; Agent Consulting Package (with support).docx; Buyer Conversion.docx; FSBO Boot Camp.docx; Listing Conversion.docx; Listing Objections Bootcamp.docx; Marketing Boot Camp.docx; Open House Boot Camp.docx; Pricing Boot Camp.docx; Reaching Your Potential.docx; Real Estate Perspective.docx; Referral Boot Camp.docx; The Leverage Summit.docx

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**EXHIBIT**  
**947**



# ***FSBO BOOT CAMP***



06-17-13

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## A TEST OF CONFIDENCE

*Real estate is a get rich business!*

### **Scenario:**

Room of 80 people who all desire to sell and will list their home with a Realtor. You have 20 minutes (face-to-face) with each person.

### **Answer the following questions:**

\_\_\_\_\_ # of people you can convince to hear your listing presentation?

\_\_\_\_\_ # of people you can convince to list with you? (No competition)

\_\_\_\_\_ % of your listings that sell?

\_\_\_\_\_ Total closed transactions procured from the room

\_\_\_\_\_ Average GCI/closing?

\$ \_\_\_\_\_ Total GCI

**How many people do you know right now who want to sell a home?** \_\_\_\_\_

**TRUTH:** You should **never** wake up and wonder who needs your services!

# FSBO BOOT CAMP

## Course Overview

<b><u>Purpose:</u></b>	To teach a <b><u>proactive</u></b> approach for effectively moving into relationship with people who have indicated a definite need to sell their home.
<b><u>Expectation:</u></b> to	After this class you should feel <b><u>confident</u></b> enough visit and follow up with For Sale by Owners.
<b><u>Result:</u></b>	<b><u>Substantial</u></b> increase in total revenue.
<b><u>Plan:</u></b>	<pre>graph LR; FSBO --&gt; NR[New Referral]; NR --&gt; SB[Sellers Buyers]; SB --&gt; CCS[Client Care Systems]; CCS --&gt; YSHI[Yard Sign Home Ad Internet Just Listed]; YSHI --&gt; NR</pre>
<b><u>Strategy:</u></b>	5-Step Follow-up Method
<b><u>Related Classes:</u></b>	Listing Conversion (conversation, pricing, objections) Buyer Conversion Marketing Boot Camp

### **Summary:**

*FSBO Boot Camp* teaches the “5-Step-Follow-up” method, which is a very complete and **non-threatening** approach for working For Sale by Owners. Associates are taught how to proactively approach, follow up with, and close FSBOs in a way that adds value to all. Plans, scripts, and follow-up materials are provided.

# THE FINANCIAL CONSEQUENCES

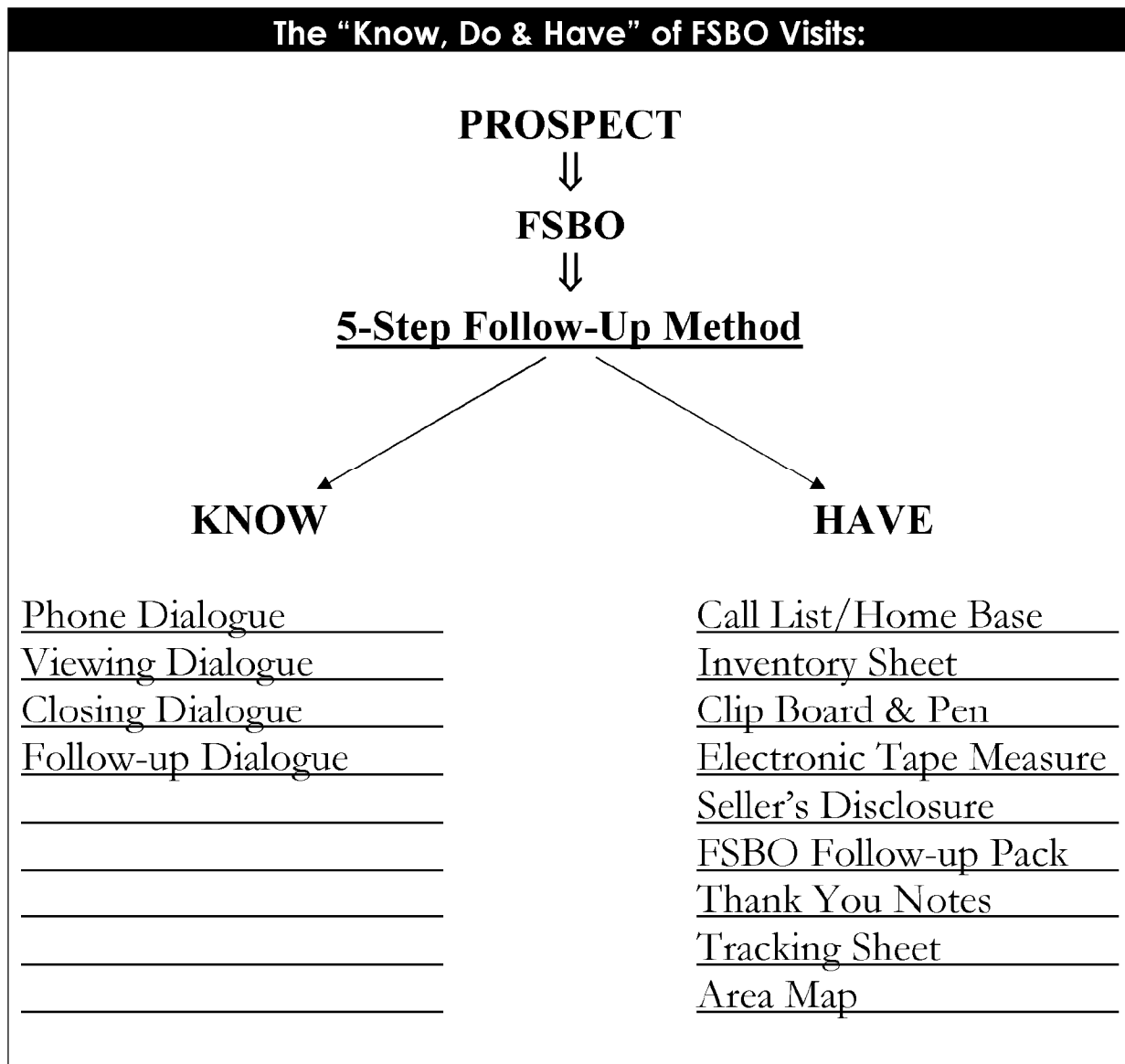
*The financial security of a proactive lead generator!*

	<b>Consistent</b> (Phase 1)	<b>Efficient</b> (Phase 2)	<b>Proficient</b> (Phase 3)
<b>Weeks</b>	<b>48</b>	<b>48</b>	<b>48</b>
<b>New Visits/Week</b>	<b>2</b>	<b>2</b>	<b>2</b>
<b>Total New Visits</b>	<b>96</b>	<b>96</b>	<b>96</b>
<b>Set Rate</b>	<b>15%</b>	<b>25%</b>	<b>33%</b>
<b>Total Meetings</b>	<b>14</b>	<b>24</b>	<b>32</b>
<b>Conversion Rate</b>	<b>50%</b>	<b>75%</b>	<b>90%</b>
<b>Total Listings</b>	<b>7</b>	<b>18</b>	<b>29</b>
<b>Sales Percentage</b>	<b>50%</b>	<b>75%</b>	<b>95%</b>
<b>Total Sold</b>	<b>4</b>	<b>14</b>	<b>27</b>
<b>Average GCI</b>			
<b>Total Income</b>			

**NOTE:** The above numbers have proven to be conservative when using the 5-Step Follow-Up Method.

# FSBO PLAN

**TRUTH:** Wealthy people work from goals, models, and plans!



## WHY VISIT A FSBO?

Because **100%** of FSBOs have an **immediate** desire to sell their home.

This, coupled with the fact there are **six** possible income streams that come from FSBO relationships, makes it the **most** dollar-productive lead generation source!

### Possible streams of income:

1. Sell FSBO's home
2. Take FSBO's listing
3. Work FSBO as a buyer
4. Get referral from FSBO
5. Get referral for FSBO
6. Provide service for a fee

### **Why would someone go FSBO?**

**Answer:** To save \$\$\$\$\$\$\$\$\$\$!

**Question:** If everyone were **just** into saving money, wouldn't we all drive Yugos?

**Truth:** It's a perception of VALUE! FSBOs don't think a Realtor is worth 6% PERIOD! (Most of the time they are right)

### **It's up to you, over time, to prove your value!**

Moving into relationship with FSBOs is all about having them **self-discover** what a working relationship with **you** will be like.

If they like what they see and hear, your opportunities to form a working relationship increase dramatically. If they perceive no value, you basically have no chance!

The # 1 goal is to **differentiate** yourself from your competition! This means you must, look, sound, and behave different from the very beginning.

**Remember:** Typical behavior reaps **typical** results...\$25,000/year!

# **FINDING FSBOs**

*The key is to be proactive and atypical!*

1. **Drive-By** – routinely driving around a **home base** looking for yard signs has proven to be the **best way** for proactively moving into relationships with FSBOs. (Your competition won't do it!)

## **Drive-By Plan:**

- \* Define your **home base** – **ANY** area you desire to take multiple listings
- \* Identify all neighborhoods within a **2-mile** radius of home base using an area map
- \* Move into relationships with all FSBOs within the 2-mile radius of home base
- \* Identify all neighborhoods within a **4-mile** radius of home base using an area map
- \* Move into relationships with all FSBOs within the 4-mile radius of home base
- \* Identify all neighborhoods within a **6-mile** radius of home base using area map
- \* Keep expanding 2 miles in each direction to fulfill FSBO performance standard

**NOTE:** The 2-mile radius approach allows for more **consistent** follow up, which is the key to your success with FSBOs.

## 2. **Other Sources:**

- (a) Local Newspapers
- (b) [www.theredx.com](http://www.theredx.com) (or other FSBO locating services)
- (c) [www.craigslist.com](http://www.craigslist.com)
- (d) Team Members (if Tier-2 or above)
- (e) Trash Service
- (f) Mail Carriers

**NOTE:** Moving into relationships with FSBOs falls under the **Buyer Specialist** function.

## STRUCTURE & FLOW

Your success with FSBOs will be directly related to your willingness to be **productively active** and to **follow up**.

### **5-Step Follow-Up System:**

Step # 1 = Visit FSBO (Inventory Sheet; Seller's Disclosure)

Step # 2 = Hand Deliver Part 1 of FSBO Guide (*100 Ways to Sell Home*)

Step # 3 = Hand Deliver Part 2 of FSBO Guide (*Money*)

Step # 4 = Hand Deliver Part 3 of FSBO Guide (*Checklists*)

Step # 5 = Follow-Up Phone Calls (Until it's either listed or sold)

**Note:** Every time you get face-to-face with a FSBO, you must give them an **item of value**. That is, something that will help them in their attempts to sell the home **themselves**.

### **The Importance of Follow Up**

50% of your competition will quit after week # 1!

75% of your competition will quit after week # 2!

90% of your competition will quit after week # 3!

100% of your competition will quit after week # 4!

**Remember:** Be Persistent...Be Tenacious...**Never Give Up!!!**

## **STEP #1 - INITIAL VISIT**

*You will not convert 100% of the leads you do not generate!*

Approach the front door **prepared** with the appropriate tools (Clip Board, Inventory Sheet, Seller's Disclosure, Pen, Tape Measure, and Business Card)

### **Knock on the front door and smile:**

*Hi, my name is \_\_\_\_\_ with RE/MAX and I noticed your home is for sale. Would you mind if I came in, viewed the home and took some room measurements so I can add it to my **For Sale by Owner Inventory**?*

### **Three Things the FSBO Could Say:**

#### **"What is that?" (Opportunity to differentiate)**

*I have a **process** that I use with **all** of my buyers where we uncover the criteria for their perfect home. I then take that criteria and match it to homes in **both** the MLS **and** my FSBO Inventory to make sure the buyers who work with me **get the home they want and more importantly want the home they get!** So what do you say, would you like **preferred** exposure to a **focused** group of buyers?*

#### **"Do you have any buyers now?"**

*I am currently working with buyers and receive calls on a daily basis, however, I need to view the house and take some room measurements so I can **match** your home to the criteria of each of my buyers. (Demonstrates you are intentional and proactive)*

#### **"We don't want to work with a Realtor!" (Don't debate)**

*I appreciate that and I understand your concern! **The reason for my visit today is not to list your home.** I would simply like the opportunity to **help you sell it.** All I want to do is come in, view the home, and take a few measurements. No pressure and no pitch! Come on, what do you have to lose? (Power phrase)*

If the FSBO says, "No, you can't come in", then offer a **Seller's Disclosure** (item of value) and say, *I wish you great success in the sale of your home. Here's my card. If there is ever anything I can do for you or anyone you know, please don't hesitate to call.* (Believe it or not, your goal was accomplished...you got **face-to-face** with a FSBO!)



# IF CALLING

## *Initial Phone Call*

If you prefer to call or if the FSBO sign reads, “**By Appointment Only**”, then use the following phone dialogue:

### **Over the Phone**

*Hi, my name is \_\_\_\_\_ with RE/MAX and I noticed your home is for sale. Would you mind if I made an appointment to come out and view the home so I can add it to my **For Sale by Owner Inventory**?*

### **Three Things the FSBO Could Say:**

#### **“What is that?”**

*I have a **process** that I use with **all** of my buyers where we uncover the criteria for their perfect home. I then take that criteria and match it to homes in **both** the MLS **and** my FSBO Inventory to make sure the buyers who work with me **get the home they want and more importantly want the home they get!** So what do you say, would you like **preferred** exposure to a **focused** group of buyers?*

#### **“Do you have any buyers now?”**

*I am currently working with buyers and receive calls on a daily basis, however, I need to view the house and take some room measurements so I can **match** your home to the criteria for each of my buyers.*

#### **“We don’t want to list/work with a real estate agent!”**

*I appreciate that and I understand your concern! **The reason for my visit today is not to list your home.** I would simply like the opportunity to **help you sell it.** All I want to do is come in, view the home, and take a few measurements. No pressure and no pitch! Come on, what do you have to lose?*

**NOTE:** It’s far easier for a FSBO to reject you over the phone.

## ONCE INSIDE THE HOME

*Sellers work with people they know, like, and trust!*

### Once invited into the home say:

*Thanks for allowing me the opportunity to view your home! What I would like to do is tour the home, make some notes and measure the rooms. **It's been my experience that room measurements are very important to buyers!** It would be great if as we walk around, you pretend I'm a buyer and point out what **you** feel are the selling features of the home. I would also appreciate it if you could document the dimensions as I measure each room.* (Hand FSBO the clipboard with attached Inventory Sheet)

As you tour the home it's important to engage the FSBO so she becomes comfortable **sharing information** with you. In addition to discussing room features, you should also build rapport around non-threatening topics that most people enjoy discussing. If you are a natural rapport builder then just do what comes naturally. If not, try mixing in some of the following questions to get the conversation moving in a positive direction:

### Ask the following questions as you tour the home:

*Are you originally from this area? How long have you lived in this area? What brought you to this area? Why are you moving?*

*What do you do for a living? What got you into that line of work? How long have you been in that field? Do you enjoy your work?*

*What do you do for fun on the weekends? Do you have any hobbies?*

**NOTE:** Ask about pictures you see of kids, family vacations, diplomas, etc.

## **CLOSING VISIT #1**

*The value is in the relationship!*

Once you have toured the home and measured the rooms, offer your **item of value** by asking:

### ***Have you prepared a Seller's Disclosure?***

**FSBO:** "What's that?"

**Consultant:** *It is basically a notice that discloses your homes current condition.* (Hand FSBO a copy)

**FSBO:** "The condition of our home is fine!"

**Consultant:** *I'm sure it is, however, state law does **require** you to supply each potential buyer with a copy.*

### **Closing the initial visit:**

*I really appreciate you allowing me the opportunity to view your home and **I wish you great success in the sale!** I'd like to touch base with you **weekly** so I can keep the information on your home up to date. Would that be okay? Would you like me to make copies of this sheet and/or the seller's disclosure and drop them back by tomorrow so you can hand them out to potential buyers? Again, thanks for your time and **if there's ever anything I can do for you or anyone you know,** please don't hesitate to call!* (Hand FSBO your business card)

**Send thank you note after visit #1** (See example on page 21)

## FSBO INVENTORY SHEET

**Address:** \_\_\_\_\_  
**Seller:** \_\_\_\_\_  
**Phone:** \_\_\_\_\_

**Sq. ft.** \_\_\_\_\_ **Year Built** \_\_\_\_\_ **Lot** \_\_\_\_\_ **x** \_\_\_\_\_

**Stories** \_\_\_\_\_ **Price** \_\_\_\_\_ **Taxes** \_\_\_\_\_

**Kitchen** \_\_\_\_\_ **x** \_\_\_\_\_ **Master** \_\_\_\_\_ **x** \_\_\_\_\_

**Breakfast** \_\_\_\_\_ **x** \_\_\_\_\_ **Closet** \_\_\_\_\_ **x** \_\_\_\_\_

**Dining** \_\_\_\_\_ **x** \_\_\_\_\_ **B/R 2** \_\_\_\_\_ **x** \_\_\_\_\_

**Den** \_\_\_\_\_ **x** \_\_\_\_\_ **B/R 3** \_\_\_\_\_ **x** \_\_\_\_\_

**Living** \_\_\_\_\_ **x** \_\_\_\_\_ **B/R 4** \_\_\_\_\_ **x** \_\_\_\_\_

**Game** \_\_\_\_\_ **x** \_\_\_\_\_ **B/R 5** \_\_\_\_\_ **x** \_\_\_\_\_

**Office** \_\_\_\_\_ **x** \_\_\_\_\_ **Utility** \_\_\_\_\_ **x** \_\_\_\_\_

<b>Heat</b> <b>G</b> <b>E</b> <b>Dryer</b> <b>G</b> <b>E</b> <b>Stove</b> <b>G</b> <b>E</b>	<b>Microwave</b> <b>Y</b> <b>N</b> <b>Sep. Shower</b> <b>Y</b> <b>N</b> <b>Pool</b> <b>Y</b> <b>N</b> <b>A</b>
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**Fireplace** \_\_\_\_\_ **Floors** \_\_\_\_\_ **Fans** \_\_\_\_\_

**Exterior** \_\_\_\_\_ **School District** \_\_\_\_\_

## **STEP #2 – FOLLOW UP**

### *Visit #2*

On your **next** scheduled follow-up day, go back and **hand-deliver** *Part 1* of the FSBO Guide (*100 Ways to Sell Your Home Fast*).

#### **Visit #2 Dialogue:**

*Hi! **I just happened to be in the neighborhood** and thought I would drop this by!*

*I definitely think it can **help you** in the sale of your home!*

*How did it go this week?*

*Are there any changes to the information you provided me?*

*Is there anything I can help you with?*

*If you ever need anything, please don't hesitate to call!*

**NOTE:** If FSBO is not at home, put follow-up material in an envelope and place at front door (don't tape your card to the door). **Call** to verify FSBO received the information using visit #2 dialogue.

**Send thank you note after visit #2** (See example on page 22)

## **STEP #3 – FOLLOW UP**

### *Visit #3*

**7 days** after visit #2 go back and **hand-deliver** Part 2 of the FSBO Guide (*Money*).

#### **Visit # 3 Dialogue:**

*Hi! **I was thinking about you** the other day and thought I would drop this by!*

*How did it go this week?*

*Are there any changes to the information?*

*Is there anything I can help you with?*

*If you ever need anything, please don't hesitate to call!*

**Remember:** If FSBO is not home, put follow-up material in an envelope and place at front door. **Call** to verify FSBO received the information using visit #3 dialogue.

**Send thank you note after visit #3** (See example on page 22)

## **STEP #4 – FOLLOW UP**

### *Visit #4*

**7 days** after visit #3 go back and **hand-deliver** Part 3 of the FSBO Guide (*Checklists & Prepare for Moving Day*).

#### **Visit #4 Dialogue:**

*Hi! **Since you are getting closer** to selling your home I thought this would be of value to you!*

*How did it go this week?*

*Is there anything I can help you with?*

*Are there any changes I should be aware of?*

*If you ever need anything, please don't hesitate to call!*

**Note:** “*Since you are getting closer...*” is very important as this phrase is designed to **solicit** a frustrated response from FSBOs. When it does, close the FSBO to a listing conversation by using the dialogue on page 19.

**Remember:** If FSBO is not at home, put follow-up material in an envelope and place at front door. **Call** to verify FSBO received the information using visit #4 dialogue.

**Send thank you note after visit #4** (See example on page 22)

## **STEP # 5 – FOLLOW-UP CALLS**

### *Weekly Phone Calls*

**7 days** after visit #4 begin weekly follow-up **phone calls!**

#### **Follow-up Phone Call Dialogue:**

*Hi, this is \_\_\_\_\_, with RE/MAX and I am just touching base with you.*

*How did it go this week?*

*Any changes I should be aware of?*

*Is there anything I can help you with?*

*If you need anything, please don't hesitate to call!*

Repeat this call **weekly** until the house is either listed or sold!

**TRUTH:** If you are **still around** in the eighth week then a relationship has been formed and the FSBO has **self-discovered** you are different from the flock!



## CLOSING FSBO TO A LISTING CONVERSATION

*Always be on the lookout for “close me,” signs!*

After using the phrase, “*Since you are getting closer...*” (or somewhere during the follow-up process), don’t be surprised if the FSBO starts asking you a lot of questions.

**“Why hasn’t our home sold?”** (Price & Exposure)

**“Should we drop the price?”** (Price)

**“What should we do?”** (Frustration)

**“How’s the market?”** (Frustration)

Really, what they may be saying is, **“CLOSE ME PLEASE”!**

**When you sense their questions are out of frustration, say:**

***It sounds to me** like it may be time for us to get together to discuss exactly what you need in the sale of your home and to see if we can create a win-win working relationship! Wouldn’t you agree?*

*“Well...” or “No...”*

*If you can get what you need in the sale of your home by forming a working relationship with me then why wouldn’t you **consider** it? If at the end of our conversation you feel like you are going to lose by partnering with me then you simply say, “not at this time”. Worst-case scenario is you will be **more informed** about the options you have in the sale of your home. Besides, you should never say no until you know what you’re saying no to. There may be opportunities available you never knew existed. I mean really, what do you have to lose? (Power phrases)*

## ONE MORE THING

Don't be surprised if at some point a FSBO asks, "So why are you doing all of this? What's in it for you?"

### Value-for-Value Dialogue:

*I do this because I believe in win-win relationships!*

*If I give you things of value that help sell your home that's a definite win for you! Would you agree?*

*Well, if you happen to run across someone who wants to sell a home and doesn't want to go FSBO, you may think of my name; and if you do, that's a definite win for me!*

*You see, sometimes there's just value in knowing people!*

## FSBO THANK YOU NOTES

FSBO thank you notes should be written on thank you cards or Just-a-Notes.

### NOTE WHEN A FSBO SELLS ON OWN:

(Name)

Congratulations on the sale of your home! You should feel proud of this great accomplishment. Although we didn't get to develop a business relationship, I did enjoy our visits together as well as our conversations over the phone. If I can ever be of service to you or anyone you know please feel free to contact me. Congratulations again and best of luck with your move!

### NOTE AFTER INITIAL VISIT:

(Name)

Thank you for taking the time to show me your home. I really enjoyed meeting you and wish you much success in the sale! If I can ever be of any help to you or anyone you know, please don't hesitate to call me.

**Remember:** You are allowing the FSBO to **self-discover** what a working relationship with you will be like. Thank you notes demonstrate you care and can communicate at a high level.

## **FSBO THANK YOU NOTES (continued)**

### **THANK YOU NOTE AFTER FSBO VISIT #2:**

(Name)

I hope you found the information I dropped off helpful and to contain some valuable information on getting your home sold. I hope you have a great week and continued success with the sale of your home! Please feel free to call me if you have any questions or need any assistance.

### **THANK YOU NOTE AFTER FSBO VISIT #3:**

(Name)

I hope you found value in the financial information I dropped off today. Again, I wish you the best of luck in selling your home and please don't ever hesitate to call me with any questions you may have!

### **THANK YOU NOTE AFTER FSBO VISIT #4:**

(Name)

I hope you found the checklists to be helpful. Have a terrific week and please let me know if you have any questions about the contract-to-close process!

# **COMPREHENSIVE QUESTIONS**

## **ADVANCED DIALOGUE**

*Comprehensive questions are designed to reveal weaknesses and change thinking!*

Once you gain confidence with FSBOs and want to be more effective on the **initial** visit, ask the following comprehensive questions designed not only to reveal FSBO weaknesses, but also to **imply** your value as a listing (and selling) consultant.

### **Accountability Related Questions:**

*How long has the home been for sale?*  
*Have you received any offers?*  
*How many times has the home shown?*  
*What feedback are you getting from the potential buyers?*  
*Has any home like yours sold while yours has been on the market?*

### **Exposure Related Questions:**

*How are you marketing the home?*  
*How's the response been?*  
*Have any Realtors shown the home? (If so, what was their feedback?)*

### **Price Related Questions:**

*How did you arrive at your list price?*  
*Did you consider the pricing benchmarks and trends that exist in the area?*  
*Are you aware of what's sold and expired within the last year in this area?*  
*Are you aware of the supply and demand in the neighborhood? Specifically, the numbers of months of inventory available for a home like yours?*  
*Did you consider the consequences of pricing high before you chose your price?*  
*Do you think this kind of information would be of value...? (See pg. 24 for closing dialogue)*

### **Opportunity Related Questions:**

*What are you going to do after you sell the home? (See pg. 25 further dialogue)*  
*Have you prepared a Seller's Disclosure? (See page 13 for further dialogue)*  
*Are you willing to pay me 3% if I bring you a buyer? (See next page further dialogue)*

## CLOSING FROM PRICE RELATED QUESTIONS

*You must indicate you possess value beyond the typical agent!*

**Use this closing directly after asking comprehensive pricing question**

*Do you think this information would be of value to you and could help you in your attempts to sell the home yourself?*

If “Yes”: *When would be a good time for me to come out and share the information?* (Set time and date for listing conversation.)

**NOTE:** Your goal is to get your value proposition in front of people! If a FSBO has an opportunity to experience your listing conversation then the chance of creating a win-win working relationship increases dramatically. Remember, you live in a world of abundance, not scarcity!

If “No”: Continue by asking opportunity-related questions

## OPPORTUNITY RELATED QUESTIONS

*Perspectives have a tendency to change over time!*

### **Working FSBO as a Buyer:**

**Consultant:** *What you are going to do after you sell the home? Will you be staying in this area or will you be leaving town?*

**FSBO:** *"We will be looking for another home in this area!"*

**Consultant:** *How are you going about finding your perfect home? Would you like to use a **proactive process** that will guarantee you get the home you want and more importantly want the home you get? That process begins with us sitting down for an hour so I can uncover exactly what you need in your next home, define your financial comfort zone, and thoroughly discuss the roles and expectations that we would have of one another in a successful working relationship. Does that sound like something that could benefit you?*

**FSBO:** *"We would rather sell first and then look!"*

**Consultant:** *Great! Are you willing to pay me...?*

### **Real Estate Fee**

**Consultant:** *Are you willing to pay **me** 3% if I bring you a buyer?*

Regardless of FSBO's response, write the answer (3% or 0%) on top of the Inventory Sheet. Don't be discouraged if the FSBO says "no" as the response is based solely on their perspective that day and perspectives have a tendency to change.

If you have a buyer whose criteria match the home of a FSBO who indicated an unwillingness to pay, call the FSBO and say: *I have a buyer whose criteria match your home. I noticed in my notes that when we first talked you were unwilling to pay me 3% for selling your home, has that changed?* If the FSBO agrees to pay your fee then include the home on your tour (after getting a one-time showing agreement signed). If the FSBO remains unwilling to pay, exclude the home from the tour (unless the buyers are willing to pay your fee).

# FSBO TRACKING SHEET

*What gets measured gets done!* Peter Drucker

Week: \_\_\_\_\_

DAY	ATTEMPTS	VISITS	SETS	MEETINGS	LISTINGS
Monday					
Tuesday					
Wednesday					
Thursday					
Friday					
Saturday					
Sunday					
<b>TOTALS</b>					

Glad I Did \_\_\_\_\_

Wish I Had \_\_\_\_\_

Biggest Learning Lesson:

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## Definitions

<b>Attempt:</b>	Door knock or phone call (not email, snail mail, or internet)
<b>Visit:</b>	<b>Face-to-face</b> tour of home (not phone call)
<b>Set:</b>	Specific date & time established for <b>listing</b> meeting (not potential)
<b>Meeting:</b>	Face-to-face, <b>listing</b> conversation with FSBO (not phone presentation)
<b>Listing:</b>	Signed and <b>executed</b> listing agreement (not empty promises)





***LISTING  
OBJECTIONS  
BOOTCAMP***



09-19-13

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## **BEFORE WE GET STARTED**

*We are on a never-ending quest to move away from typical!*

### **This class makes the following four assumptions:**

1. You want to **substantially** increase your listing inventory!
2. You want to master effective, **proven** dialogue!
3. You want to **differentiate** yourself from “typical”!
4. You want to **study** and **practice** to maximize your production!

**TRUTH:** Typical agents work on overcoming objections. Abundant consultants work on **preventing** objections.

Q: What’s the best way to prevent an objection?

A: Work on improving your conversational weaknesses.

Q: How?

A: SPAR

Q: How many hours did you SPAR last week with the specific intent to get better?

A: \_\_\_\_\_

**Any Aha’s?**

## **AN OUNCE OF PREVENTION**

*People will trust and follow what you can logically and tangibly explain!*

Most Realtors want dialogue that cures problems **they have created!**

A smarter approach is to internalize a system that **prevents** common problems from ever occurring!

### **To prevent listing objections, questions, & concerns you must:**

1. Allow Sellers to Self-Discover (Be a Leader)
2. Move Beyond Opinion (Be Tangible)
3. Become a Strategist (Be Logical)
4. Track Your Results (Be Accountable)
5. Improve Your Results (Be Intentional)
6. Cause Your Results (Be Proactive)

**Our goal is to eliminate this class!**

**Remember:** Sellers hire and refer Realtors who possess proven systems that guarantee results!

# **BECOMING PROFESSIONALLY ATTRACTIVE**

*Sellers work with those they know, like, and trust!*

Above all else, sellers are attracted to professionals they believe can get **results**. Thus, part of your goal is to demonstrate **you** possess the knowledge, skills, and dispositions needed to get the job done. While knowledge and skills are typically acknowledged as important, most Realtors mistakenly ignore creating or improving their dispositions, which are a necessary component of eliminating objections.

**Following is a list of some of the important dispositions you should possess:**

<b><u>Dispositions:</u></b>	<b><u>Opposites:</u></b>
Confident	Timid
Likeable	Incompatible
Approachable	Withdrawn
Open to suggestion	Closed to suggestion
Organized	Unorganized
Structured	Chaotic
Aware	Oblivious
Genuine	Phony
Intentional	Spontaneous
Proactive	Reactive
Logical	Unreasonable
Focused	Scattered
Unique	Typical
Honest	Misleading
Passionate	Indifferent

**TRUTH:** Objections **disappear** in direct proportion to a seller's confidence in you and your abilities!

# **PRICING OBJECTIONS**

*Pricing homes is not an exact science!*

**Pricing** objections are by far the **most common** form of listing objection!

Most **sellers** feel their home is worth more than it actually is and have a hard time justifying their price beyond; “what I need” “what I want” or, “what I paid”.

Since a seller’s perception is indeed their reality, you must keep **five rules** in mind when addressing **pricing** objections, questions, or concerns:

## **When faced with pricing objections, questions, or concerns:**

- (1) **Stay Into Curiosity** (Ask questions)
- (2) **Stay Away From Arrogance** (Remain likeable)
- (3) **Stay Calm** (Keep your emotions out)
- (4) **Stay Logical** (Neutralize their emotions)
- (5) **Stay Proactive** (Know your walk-away price)

**Remember:                      Justification = Leverage**

The “pricing game” is all about **justification**! Thus, you should be willing to list the home at the highest justifiable price congruent to the needs of the seller!

**TRUTH:**                      Talk is cheap! Taking overpriced listings **behaviorally communicates** a dangerous message.

# **PRICING BELIEFS**

*Beliefs form the parameters for win-win relationships!*

**Following is a list the key beliefs you must possess as a pricing specialist:**

- Pricing homes is not an exact science
- Informed people make intelligent decisions
- Homes sell for two reasons
- Sellers determine **price** (needs)
- Buyers determine **value** (past buying situations)
- Price should never exceed value (using needs to justify price)
- Seller's needs can never be used to justify value
- Buyers seldom pay more than fair market value
- Competition determines **price entry point**
- The pricing game is all about justification
- An effective pricing strategy supports win-win working relationships
- There is a difference between taking listings and selling listings
- There are opportunity costs associated with taking overpriced listings
- People have lived before you
- Pricing homes is neighborhood or area specific
- Tangible tools trump all opinions
- People will trust and follow what you can logically and tangibly explain
- It's unacceptable to leave the seller's money on the table
- What's put in motion stays in motion

**TRUTH:** These beliefs light the path of self-discovery to a correct and justifiable price entry point!

## **INITIAL PRICING OBJECTION**

*The pricing game is all about justification!*

*So based on all the information available, at what price do you think we should enter the market?*

**“Unrealistic Price”** (Stay into curiosity):

*After looking at the research we’ve covered together, would you share with me how you arrive at that price?* (Ask for their justification.)

Listen to their response and ask appropriate follow-up questions if needed.

*We could take that approach, however, in doing so (your #1 pricing or timing hot button) won’t be satisfied.* (Point to the *Lets Get Focused* sheet.)

To **justify** your point, re-examine one or all of the pricing tools while saying, *what we must remember is that the pricing game is all about justification...*

**NOTE:** Allowing sellers to self-discover using the **7-Step Pricing Strategy** virtually eliminates the above objection.



**REMEMBER:** If sellers want to price over fair market value then they are mistakenly using **their needs** as justification. Buyers do not care about seller needs!

## **USING THE PRICING TOOLS**

*Pricing homes is neighborhood specific!*

### **Seller unrealistically wants to set or use a benchmark price:**

*Per my research, the only thing your home has in common with the benchmark home(s) is/are (features/amenities).*

*As you can see, this/these homes possess (features/amenities), which appear to be driving their value. (Apples-to-Apples)*

### **Seller believes home is worth more because of a specific amenity:**

*Per my research, that amenity is fairly common in this neighborhood and alone, does not justify more value.*

*As you can see on the Active summary support pages, your main competitors also have this amenity and will be priced below you.*

*Given that, how can we effectively compete?*

### **Seller wants to list above competition:**

*We can list high however that will put us at the high end of the competition.*

*At the high end of the price range, you can expect to remain active for \_\_ months.*

*Per your timing need, this option should be unacceptable. Wouldn't you agree?*

## **USING THE PRICING TOOLS**

*People have lived before us!*

### **Seller wants to disregard competition:**

*We can do that but looking at our competition, there appears to be \_\_\_\_\_ months of inventory available. Shouldn't we position ourselves to sell within your desired time frame?*

*Per the Active summary support pages, these homes show to have the same features and amenities as yours.*

*Why would a buyer want to pay more for your home?*

### **Previous agent told me it was the wrong time of year:**

*Per my research, homes sell throughout the year? Your previous agent was simply misinformed.*

*As you can see, homes priced appropriately sell throughout the year.*

### **Seller wants to start high:**

*We can price the home high, however, before making that decision, let's take a look at the people who have tried that approach in this neighborhood and see if there are any negative consequences.*

*As you can see, when reducing price, you run the risk of leaving \$ \_\_\_\_\_ on the table and staying on the market for \_\_\_\_ days longer.*

*Based on what you shared with me earlier, both would be a direct violation of your needs.*

## **FOR THOSE STUBBORN SELLERS**

*You live in a world of listing abundance!*

**Bottom Line Dialogue** (Used once you have exhausted your justification):

*You see Mr./Mrs. Seller, finding an appropriate price for the home is not an abstract philosophy! We have the opportunity to know and understand what the buyers in your area are doing!* (Point to pricing tools)

(Lay the 3 Summary Pages you reviewed on the table.)

*In which category would you like to be?*

*Great, then the absolute highest I would feel comfortable at listing the home is \$\_\_\_\_\_. Is this agreeable to you?* (Top end of the “ROJ”)

**IF “Yes”:**

1. Verify that the agreed upon price will satisfy appropriate needs.  
(Calculate net sheet if appropriate.)
2. Ask, *How will you feel if the home sells tomorrow?*

**IF “No”** (Rare Occurrence):

*Do you remember back at the beginning of our conversation when I told you that I was here to create a win-win working relationship? I think we may have just violated that agenda. And you know I hate to say that because I really want to help you! But, if I were to take the listing at this*

*price I would consider that a win-lose relationship and remember with me, it's win/win or no deal! (Continued on next page)*

## **WIN-LOSE**

*It's win-win or no deal!* Stephen Covey

*And when I say it would be win-lose, I mean listing your property at the higher price would be a win for me and lose for you! Does that make sense?*

**“No!”**

*Well, I would take the listing and market & promote it, which would definitely generate buyers interested in your home. I would show the home and when the buyers discover that your home is overpriced, I would have no other choice but to show and sell them another home. Big win for me because I made money! Big lose for you because none of these needs have been satisfied! (Point to the Lets Get Focused sheet)*

*You see, if I thought I could get a higher price for the home I would take it because we would both profit! But I'm not about to come in here and promise you something I know I can't deliver! If I did we would just be setting it up to fail from the start and that would not feel good to me!*

*Again, how important are these needs to you? (Slide Lets Get Focused sheet in front of them.)*

**“Very!”**

*Then shouldn't we assure a win-win relationship from the start by pricing the home at a price we know we can justify?*

If “Yes” ⇒ Verify list price will satisfy the seller’s pricing and timing needs.

## **BIG HOUSE – SMALL HOUSE**

*You reap what you sow!*

### **BIG HOUSE – SMALL HOUSE:**

This message is delivered when seller wants to list in the **wrong range** or wants to “start high” and then come down. Seller’s perception is a buyer will want to pay an above market price for **their** home. Your goal is to help seller realize that by pricing the home above market value, potential buyers who can afford their house will never see it; and, those who will see their house will be comparing it to other homes that are realistically priced.

### **Sample Dialogue:** (Market Value = \$250,000)

Seller: **“My home is better than the others priced at \$250,000!”**

You: *I appreciate that and I agree your home is in fine shape. However it’s been my experience that if we price the home at \$275,000 here’s what will happen.* (Draw Big house – Small house diagram on paper.)

*Buyers who are ready, willing and able to pay \$275,000 for a home will be the ones viewing the home. They will also be comparing your home to those that are justifiably priced at \$275,000. When they discover they can get more “bang for the buck”, they will gravitate towards the other homes.*

*Likewise, buyers who are ready, willing, and able to buy your home will probably never see your home because it will not appear as an option for buyers wanting to purchase a \$250,000 home. (Realtors typically don’t search \$25,000 over a buyer’s price ceiling.) Therefore, shouldn’t we choose a price we*

*can justify so the people who are ready, willing and able to buy it will see it?*

## **BIG HOUSE - SMALL HOUSE**

### **Sample Dialogue:**

**Seller:**        **“We want to list at \$275,000 for a few weeks and then come down to \$250,000.”**

**You:**            *I appreciate that however the first 30 days your home is on the market are the most crucial. You see it’s been my experience if we start the home at \$275,000 here’s what is likely to happen. (Draw home diagram on paper.)*

*In the first few weeks we will generate a lot of showings. However the buyers who will be viewing the home will be buyers who are ready, willing and able to pay \$275,000 for a home. They will also be comparing the home to those that are justifiable priced at \$275,000. During that process, they will discover they can get more “bang for the buck” and as a result, buy the larger home (home with more upgrades).*

*During these same crucial weeks there will be buyers who are ready, willing, and able to buy your home but will probably never see your home because most agents are not going to show homes that are \$25,000 over a buyers price ceiling. We will also lose these buyers forever because they will either buy another home or wait to hear from their agent who will typically only search new listings and not price updates. Doesn’t it make more sense to select a price we can justify so the people who are ready, willing and able to buy it will see it? I mean can we really afford to miss a majority of*

*the qualified buyers for your home when their interest is at a peak level?*

## **OTHER PRICING CHALLENGES**

*Beware of sellers who refuse to acknowledge simple logic!*

**“We still think our home is better and have an unexplained need to price it \$25,000 over market value!”**

*Well we could list the home \$25,000 over market value but in doing so let me define for you our new target market:*

*(1) Cash Buyer*

*(2) Need to pay \$25,000 over market value*

*How many of these buyers do you think exist?*

*My research shows that listing the home \$25,000 over market value will result in these needs (show Lets Get Focused sheet) not being fulfilled!*

*How are you going to feel if (priority # 1 hot button) isn't satisfied?*

*Then shouldn't we do everything within our control to make sure that doesn't happen?*

## **OTHER PRICING CHALLENGES**

*You don't need unmotivated sellers in your life!*

**“We’ve done all this updating over the past year!”**

*I appreciate that and in a buyer's eyes that may mean you've simply brought the home up to selling standards!*

*If you were a buyer and two similar homes were for sale, one for (higher price) and one for (lower price) which would you buy?*

*Wouldn't you agree most buyers would feel like you?*

*Is this going to be an issue?*

**If Yes**      ⇒      Go to Win-Lose Dialogue



**Remember:** Upgrades were taken into consideration when analyzing property condition and amenities and thus should be reflected when **positioning** the home within the correct value range.

## **OTHER PRICING CHALLENGES**

*Buyers don't care about sellers' needs!*

**“We have to have \$25,000 to buy another home!”**

*Mr./Mrs. Seller, pretend for a moment that you are a buyer, we have already seen five homes and I show you this one. You like it, but you're curious why it is priced so far above the market. I reply that the seller has to have \$25,000 to buy a new home.*

*What would you do as a buyer?*

*You see if I could net you \$25,000 more I would love to! We both would profit!*

*I can only get you what the market will bear and that is right here (waive Sold Summary Page) in these comparables!*

*Does that make sense?*

*I guess we could list the home for \$25,000 over the market but in doing so these needs (show Lets Get Focused sheet) will not be fulfilled!*

*How will you feel if these needs aren't satisfied?*

*Then shouldn't we price the home where these needs have the best chance of getting satisfied?*

## **OTHER PRICING CHALLENGES**

*The leverage is in the listing!*

**“Joe said he would list my home above the market!”**

*Of course he did!*

- 1. How did Joe justify his price?*
- 2. Did he share his numbers with you? Do you have a copy?*
- 3. Do you think what buyers have done in past buying situations is important?*
- 4. Do you think Joe was only telling you what he thought you wanted to hear?*

*Well understand I'm okay with listing the home at \$275,000 if we can justify \$275,000. Otherwise, I would consider that a win-lose relationship and with me, it's win-win or no deal! And when I say it's a win-lose relationship I mean it would be a win for either Joe or me and lose for you!*

*It's my opinion that Joe has agreed to take your listing at such a high price because he wants to use your home as **leverage**!*

**“What do you mean?”**

*Joe will advertise your home, which will generate buyer leads. However, when potential buyers discover your home is overpriced, they will look to Joe to sell them another home! **Win for Joe** because he made money! **Lose for you** because none of your needs are being satisfied!*

*Anyone who tells you he can get \$\_\_\_\_\_ for your home is USING your home as leverage to attract buyers! Both Joe and I know what's going on, I'm just the only one being honest about it! Does that make sense?*

*How important are these needs to you? (Slide Lets Get Focused sheet in front of them.)*

**“Very important!”**

*Then shouldn't we assure a win-win relationship from the start by pricing it appropriately?*

## **OTHER PRICING CHALLENGES**

*You must know your walkout price!*

**“Joe said he would list my home above the market!”**

*Are you saying that you will not list the home with me unless I list it in the “Realm of Ridiculous”?*

**“Yes!”**

*Great, here's my suggestion. I want you to sign a three-month listing agreement with Joe and hold him accountable to HIS PRICE.*

*WHEN the home doesn't sell, give me a call and I will be glad to come back out!*

*Would that be fair? (Start packing your materials)*

*I mean I would love to take the listing however I refuse to do it at the expense of your wins.*

*Before I leave, let me ask you one more question, do you really have three months to wait?*

*What's your plan B?*

## **OTHER PRICING CHALLENGES**

*What's put in motion stays in motion!*

**“Shouldn't we leave room for negotiation?”**

1. *That's a great question! What's important to you about leaving room for negotiation?*
2. *So, your justification for pricing your home high is just to leave room for buyers wanting to negotiate?*
3. *If we leave room for negotiation, what do you think we will get?* (Negotiation)
4. *Right. And, are you willing to negotiate down to a market price?* (Typically, Yes)
5. *Are you willing to negotiate to a below market price?* (Typically, No)
6. *Do you think it would be better to position you in a way to generate one offer or multiple offers?* (Multiple)
7. *May I share with you my philosophy on negotiation?* (This is simply a strategy)

*If we price a home like most AGENTS and leave room for negotiation, then negotiation is what we'll get! Because we are priced like everyone else in the market place (high), we may generate **one** offer, which really weakens our negotiating position! And, because of our weakened position, the price typically gets negotiated down to at or below market value!*

*It's been my experience if we price the home directly on the market we create an “illusion” in the market place. Because so many agents overprice their listings, a home priced directly on the market appears to be a “deal” giving us a better*

**CHANCE** to generate multiple offers which **COULD** drive the final, agreed upon price above the list price! Now understand the home will only appear as a “deal”. We know it’s not under priced because we have used a 7-step pricing strategy to arrive at the proper price entry point. Does this make sense?

So which pricing strategy has a better chance of satisfying your specific needs? So where do you feel we should price the home?

## **BEFORE LEAVING PRICE**

*You must eliminate any potential seller remorse!*

**“How will you feel if your home sells tomorrow?”**

If, “**I would feel like I priced it too low**”, then ask four more questions:

1. *May I ask why you would feel that way?*
2. *Is your goal to get your needs met within your designated time frame?*
3. *Would you agree that pricing your home at the appropriate price entry point increases the odds of getting one or more offers within your designated time frame?*
4. *Would you feel your needs were any less satisfied if the offer came on the 1<sup>st</sup> day as opposed to the 60<sup>th</sup> day?*

*I guess the point is; all the research we just analyzed assures us of the most appropriate price entry point.*

*Now, we really shouldn’t care when the right person sees it as long as they see it within your designated time frame. Correct?*

*Therefore, if someone who is ready, willing and able to pay \$\_\_\_\_\_ for your home sees it the first day it’s on the market, we should expect an offer. Wouldn’t you agree?*

*You see we really can't control when the right person sees it, we can only control if they see it.*

*So, if the right person sees it on the first day this in no way means we priced the home too low, it simply validates the fact that we priced it just right.*

*Does that make sense?*

## **COMMISSION QUESTION**

*Cost is only an issue in the absence of value!*

**“Will you work for five percent?”**

*Why, do you not think I'm worth 6%? (Wait for response)*

*I really can't because I would consider that a win-lose relationship and remember with me, it's win-win or no deal!*

*You see Mr. Seller; I firmly believe one party should not have to lose for the other party to win!*

*If I take the listing, I am going to provide you with exceptional, quality, consultative-type service, which will be a definite win for you! Right?*

*Accepting a lower fee for services you've already deemed more valuable would be a definite lose for me because I can't operate a successful business on 5%! Plus, it just wouldn't be fair if I charged you 5% and all of my other clients 6%! That wouldn't feel good to me! Does that make sense?*

**If, “No”:** (Gut-check time)

*I would love to take the listing however I refuse to do it at the expense of a win-win relationship. Therefore at this point, I must gracefully bow out. I hope you understand!*

**REMEMBER:** The best thing about your business is, it's your business!

## **COMMISSION QUESTION**

*If you don't have your own plan you'll always be part of someone else's!*

**“Will you work for five percent?”**

*I guess I could but if I gave up my money that easily you wouldn't respect me as a businessman (woman) and if you don't respect be as a businessman (woman) you darn sure don't want me handling a large financial transaction like this for you!*

*After our conversation tonight, do you feel I have the knowledge, skills and competencies to sell your home?*

*Do you see a difference in my approach?*

*Do you see **more value** in my approach?*

*Great, then shouldn't we move ahead with this?*

## **COMMISSION OBJECTION**

*There are definite differences between agents and consultants!*

**“Joe said he would list my home for 5%!”**

*That’s great, you see how easily Joe sacrificed his money, just think how frugal he’s going to be with yours! Is Joe a consultant?*

**“I don’t know!”**

*Did Joe ask you what **YOU** needed in the transaction or did he make some basic assumptions?*

**“He didn’t ask?”**

*Did Joe help you put together the specific plans and strategies that if implemented and held accountable will result in getting the home sold?*

**“No!”**

*Did Joe thoroughly discuss each person’s role and expectations in the relationship?*

**“No!”**

*Do you see value in these things?*



**“Yes!”**

*Do you see a difference in Joe’s approach and mine?*

**“Yes!”**

*Then why should I charge the same fee as Joe?*

*My fee is 6%! Is this going to be an issue?*

## **COMMISSION OBJECTION**

*You will always charge what YOU believe you are worth!*

**“Joe said he would list my home for 5%!”**

*Well, I guess Joe knows what he’s worth! (ha-ha)*

*Bottom line, after our conversation tonight, do you think you and your investment are in better hands with me or with Joe? (You can’t ask this question if you are “typical”)*

**If, “Joe”    ⇒    Next!!**

**If, “You”:**

*Great, then shouldn’t we make this a win-win relationship from the start?*

**If, “You but I still want you to work for 5%”:**

*Do you remember back at the beginning of our conversation when I told you that I was here to create a win/win working relationship? I think we may have just violated that agenda.*

*If I take the listing, I am going to provide you with exceptional, quality, consultative-type service, which will be a definite win for you! Right?*

*Well accepting a lower fee for services you've already deemed more valuable will be a definite lose for me because I can't operate a successful business on 5%! Plus, it just wouldn't be fair if I charged you 5% and all of my other clients 6%! That just wouldn't feel good to me! Does that make sense?*

**If, "No":**

*I would love to take your listing however I refuse to do it at the expense of a win/win relationship. Therefore at this point, I must gracefully bow out. I hope you understand!*

## **COMMISSION CONCERN**

*Your value proposition should be relevant, irresistible, and irreplaceable!*

**"Why should I pay you 6% when Joe wants 4%?"**

*Peace of mind!*

**"What do you mean?"**

*You can be certain that my #1 goal is to satisfy these specific needs! (Point to Lets Get Focused sheet) If I feel there is a need here that I can't satisfy then I won't take the listing! Can Joe say the same thing?*

**"Yes!"**

*Did Joe ask you about these specific needs or did he just ASSUME he knew what your needs are?*

**"He didn't ask!"**

*Then how can you be assured Joe's priority is getting your children in school on time? (Always refer to their #1 hot button)*

*Did Joe thoroughly discuss each person's role and expectations in the relationship?*

**“No!”**

*You see Joe and I don't resemble at all, yet you want us to work for the same fee? Bottom line, do you feel you and your investment are in better hands with me or with Joe?*

**“You!”**

*Great, then shouldn't we make this a win-win relationship from the start?*

## **COMMISSION SIDE NOTE**

*Never talk commission rates over the phone!*

**“What do you charge?”**

*That's an interesting question given you've yet to meet with me and discover the value I provide.*

*Have you had a bad experience with a Realtor?*

*I really don't think I should answer that question until you've had a chance to discover the value in a working relationship with me.*

*I do however appreciate your concern so here's my suggestion:*

*Let's go ahead and meet and at the end of our conversation I'll let you determine what I'm worth.*

*Does that sound fair?*

**NOTE:** Answering the above question directly eliminates a lot of opportunities. Deflecting the concern increases your win-win percentage!

## **TERM OF LISTING OBJECTION**

*Make doing business with you easy and convenient!*

**“We want to sign a three month listing agreement!”**

*I would like to list the home for six months and give you an easy-exit clause!*

*What that means is that in the special provisions of the contract we will state that if at any time you become dissatisfied with my service or with me as a professional you can fire me with 48 hours written notice!*

*Is that fair?*

**Insert the following in special provisions:**

If seller becomes dissatisfied with broker's service, seller may terminate this agreement with 48 hours written notice.

Or

If seller or broker becomes dissatisfied with the other's services or promises to perform, either party may terminate this agreement with 48 hours written notice.

**NOTE:** Only agree to this when it is the difference between taking the listing and not.

### **OFFICE LOCATION OBJECTION**

*Success is two-dimensional!*

**“Where is your office located?”**

- 1. That's an interesting question, why do you ask?*
- 2. Have you visited with anyone who has, in your opinion, a desirable location?*
- 3. Did they uncover your needs?*
- 4. Did they talk about the plans and strategies needed to sell your home?*
- 5. Did they thoroughly discuss each of your roles and expectations in the working relationship?*
- 6. Do you see value in these things?*

**“Yes”**

*Exactly! You see, getting these needs fulfilled (Point to the Lets Get Focused sheet) is not about office location, it's about you having the desire to get your home sold, and then finding the environment that best supports your goals. Now in my opinion, **support** doesn't equal location. Support is, do you feel confident that the associate you are hiring can put together the plans and strategies that when implemented and held accountable will get your home sold. Wouldn't you agree?*

*Great! After our conversation tonight, do you think I can get the **results** you're looking for?*

## **FRIENDSHIP OBJECTION**

*Openly sharing your value proposition always leads to future opportunities!*

**“I Have a Friend In The Business!”**

**If objection comes during the solicitation:**

*That's great! Since this is such a large financial transaction, how about I come in and give you a **second opinion**?*

*Worse case scenario, you will have another set of eyes and ears to help you devise an appropriate plan of action.*

**If objection comes during the conversation:**

- 1. Why exactly am I here tonight?*
- 2. Is your friend a full-time Realtor?*

3. *How good are you at separating business and friendship?*
  4. *How good is your friend at separating business and friendship?*
  5. *Did your friend sit down with you and uncover your needs?*
  6. *Did your friend show you the plans and strategies needed to sell your home?*
  7. *Did your friend thoroughly discuss the expectations for each of your roles in a **business** relationship?*
  8. *Do you see value in these things?*
  9. *In the event your friend doesn't meet your expectations, will you be able or willing to fire him/her?*
- If “No!” ⇒ “How can you hold him/her accountable?”*

## **EXPERIENCE OBJECTION**

*Openly sharing your value proposition always leads to future opportunities!*

### **“How Many Homes Have You Sold?”**

**Inexperienced agent:** *That’s a great question and before I answer, may I ask why that’s important to you?*

**Seller:** “Experience = Better” (implied answer)

*I see, well, I have sold x homes (be completely honest). Does that concern you?*

*The bottom line is you need someone who possesses the knowledge, skills, and competencies to sell your home. Wouldn't you agree?*

*Well after our conversation tonight do you think I'm capable of getting your home sold?*

**If objection comes during the solicitation:**

*I see, well, I have sold x homes. Now don't let that alarm you because what I or anyone else has done in the past makes little or no difference to your specific situation.*

*How about I come out for an hour and meet with you and at the end of our conversation you can determine if I'm capable of handling the job? I mean really, should you say no until you know what you're saying no to?*

**Bottom Line:** Sellers need to know you have an intentional and proactive game plan. They also need to be confident that once your strategies are implemented and held accountable, their home will sell!

## **BONUS FOR BEING HERE**

*Never say no until you know what you are saying no to!*

Any objection, question, or concern that happens **during the solicitation** can be overcome with the following dialogue:

*Let's have a conversation. If at the end of our conversation you still... then I won't list the home. However, by meeting with me you may find out you can get all you want and more! We won't know though until we've had a conversation.*

### **Examples:**

*If at the end of our conversation you still **feel like it's not a good time to sell**...*

*If at the end of our conversation you still **feel like I'm not worth what I charge**...*

*If at the end of our conversation you still **feel like my office is too far away**...*

*If at the end of our conversation you still **want to list with your friend**...*

*If at the end of our conversation you still **feel all Realtors are crooks**...*



*If at the end of our conversation you still **feel a need to go FSBO**...*

*If at the end of our conversation you **see no difference between the others and me**...*

*If at the end of our conversation you still **feel I'm too inexperienced**...*

*If at the end of our conversation you **feel like I can't handle the job**...*

*Etc...*



# ***THE LEVERAGE SUMMIT***

*The ultimate guide to finding and attracting  
highly functional team members*



10-25-13

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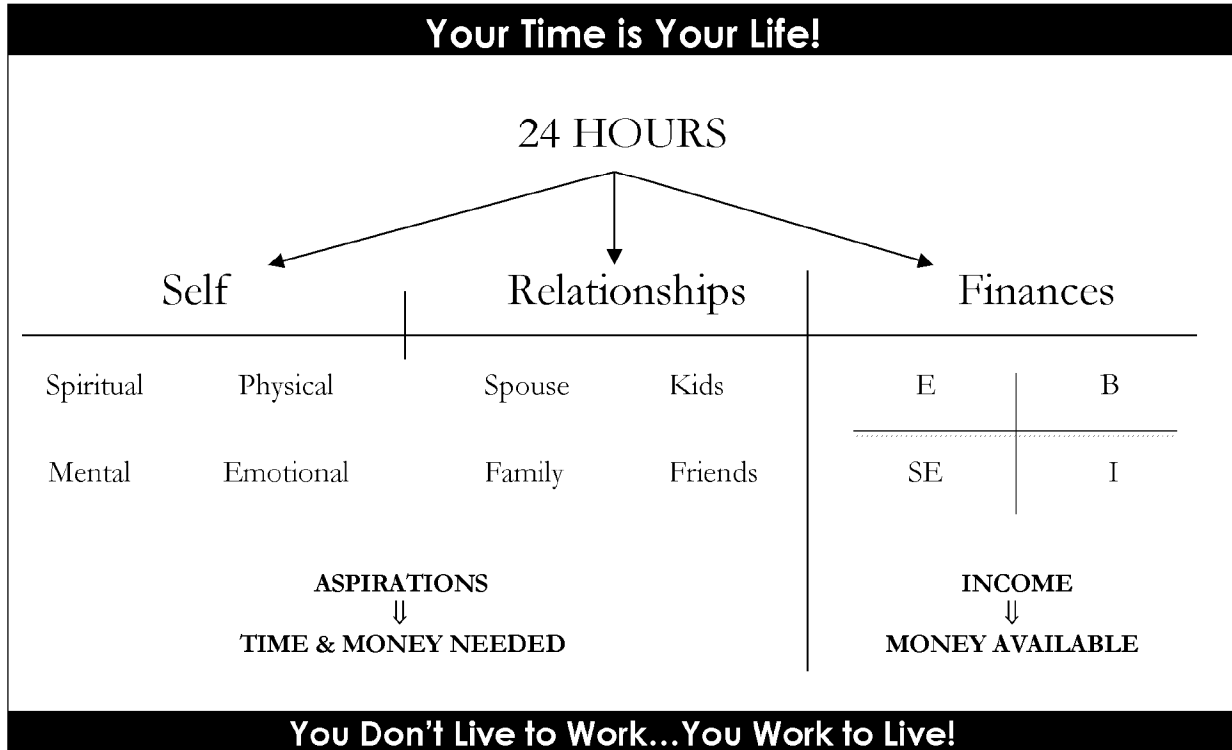
*People assume everyone wants to reach their potential and be  
the best they can be...*

*I've concluded most only want to be average and do  
just enough to get by!*

Nick Saban

# WHY WORK?

Answer: \_\_\_\_\_



**Creating an unlimited life of abundance requires both time and money**

Earned Income  
 ↓  
 Work is a Necessity  
 ↓  
**Money**

Passive Income  
 ↓  
 Work is a Choice  
 ↓  
**Time & Money**

**REMEMBER:** The goal is to live an unlimited life in a limited amount of time!

# CHOOSING A CAREER PATH

*Two roads diverged in a wood, and I, I took the one less traveled by, and that has made all the difference!* Robert Frost

## **Full-time Realtors fall into one of four categories:**

1. Typical Salesperson (remains in Phase 1)
2. Unique Salesperson (progresses from Phase 1 to Phase 2)
3. Typical Entrepreneur (jumps from Phase 1 to Phase 3, bypassing Phase 2)
4. Unique Entrepreneur (progresses from Phase 2 to Phase 3)

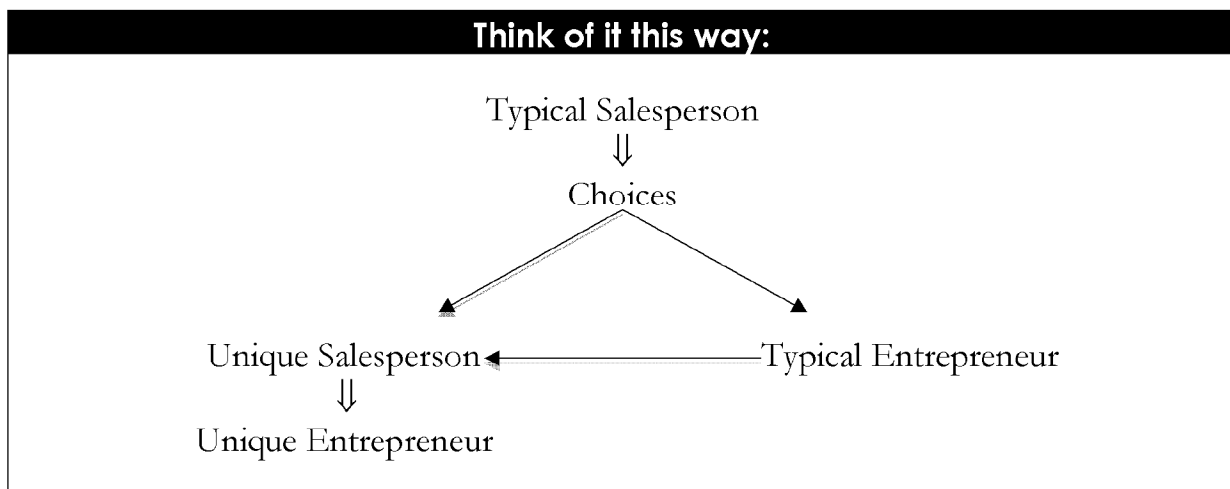
## **First you must establish your approach...**

1. Typical (stays in comfort zone – spontaneous & reactive – easy & convenient)
2. Unique (seeks potential – intentional & proactive – challenging & rewarding)

## **...then you must determine your role:**

1. Salesperson (focuses on job – all about “me” – gets rich)
2. Entrepreneur (focuses on business – leverage is the key – gets wealthy)

**TRUTH:** Everyone begins as a **Typical Salesperson**



# **THE POWER OF DELEGATION**

## **Five Great Reasons to Delegate:**

1. There is a limited amount of time!
2. You want to operate at your highest and best use!
3. You want to eliminate peak and valley results!
4. You want to live an abundant life!
5. You want to get “wealthy”!

## **Any Other Reasons?**

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**Let’s examine each more closely...**

# YOUR ONLY LIMIT IS TIME

*Money is not the key asset in life; time is!* Gordon Gecko

Your career goal should be to make as much money as you can in the hours you are willing to invest. Understanding this concept and behaving accordingly is the **first step** towards creating and funding the life you aspire.

Since time is indeed your ONLY limit in life, it should be viewed as a precious resource never to be squandered.

Time Limits			
Day:	24 Hours	Month:	730 Hours
Week:	168 Hours	Year:	8,760 Hours
Life: ??????????			
Tomorrow is not guaranteed!			

You are not guaranteed one more day on this earth so you must make each and every day relevant by viewing it as an opportunity to progress and “make a difference”!

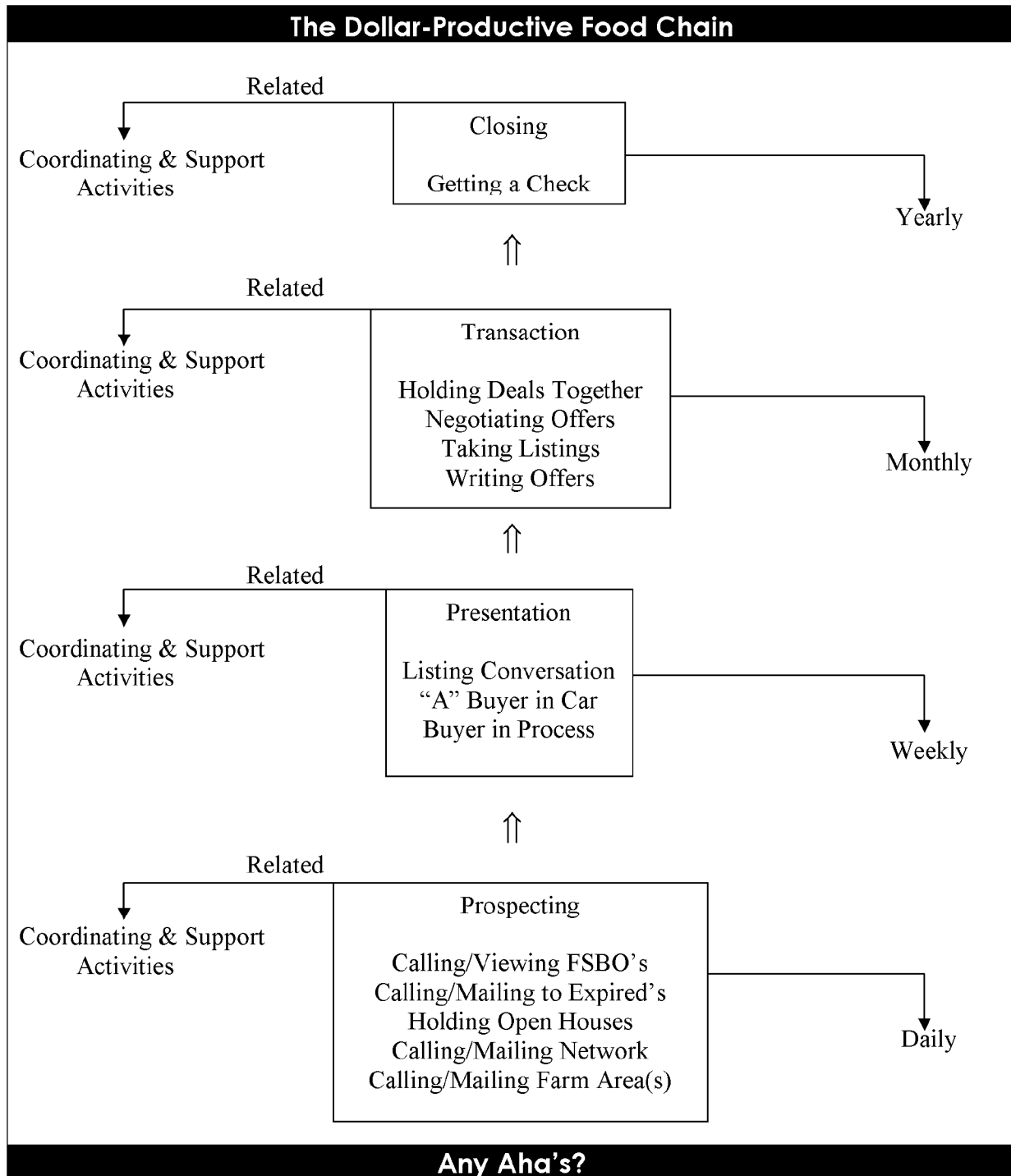
Remember, there is an "opportunity" cost associated with wasted time, so it's vital that you budget your time as you would your money.

The cost of wasting 1 hour per day; 6 days per week:
6 x 50 weeks = 300 hours/year
300 x 30 dials/hour = 9,000 additional listing dials
9,000 x 15% talk/dial conversion = 1,350 additional listing talks
1,350 x 10% appointment/talk conversion = 135 additional listing sets
135 x 80% show up rate = 108 additional listing meetings
108 x 60% taken/appointment conversion = 65 additional listings taken
65 x 67% sold/taken conversion = 44 additional closed transactions
44 x \$5,000 (average GCI/closing) = \$220,000 additional gross commission income
\$220,000 x 65% = \$143,000 additional net income (after taxes and charity)
\$143,000 per year invested at 8% for 10 years = <b>\$2,071,578</b> additional life changing wealth
Note: This example excludes collateral benefits from having an additional 68 listings
The goal is to be at your highest and best use for any hour invested!



# OPERATING AT YOUR HIGHEST & BEST USE

The real estate industry can look overwhelming if you don't understand priorities!



# ELIMINATING PEAK & VALLEY RESULTS

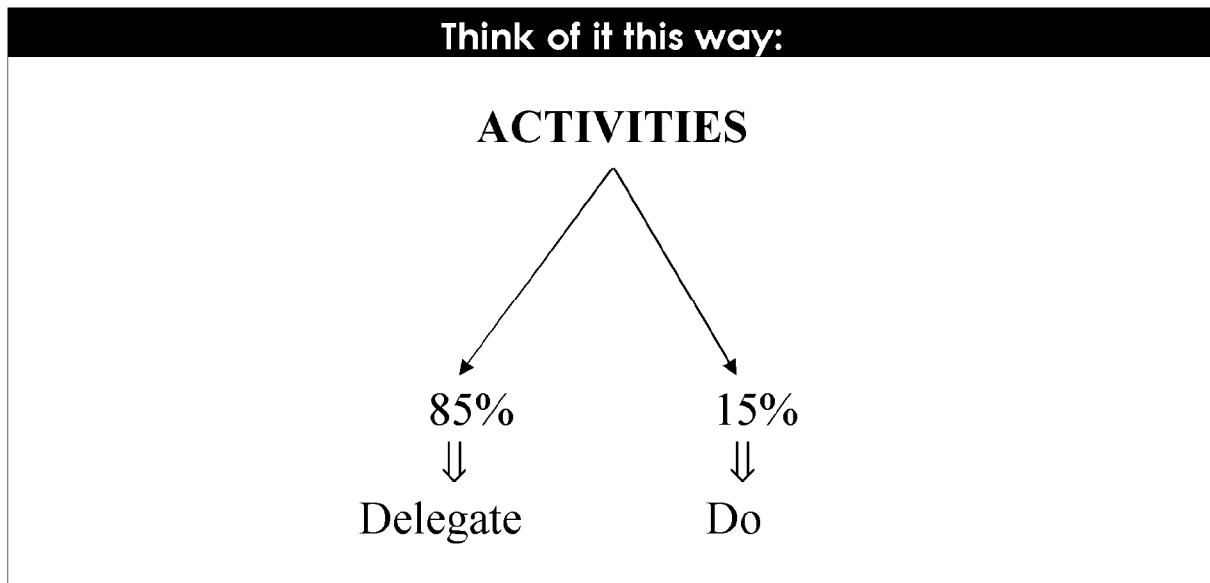
*Don't be a "peak and valley" agent!*

## **What's a peak and valley agent?**

A "peak and valley" agent is one whose **focus shifts** from month to month! One month the focus is on securing a lead and the next month on the "stuff" it takes to close the transaction.

## **But the "stuff" must be done! Right?**

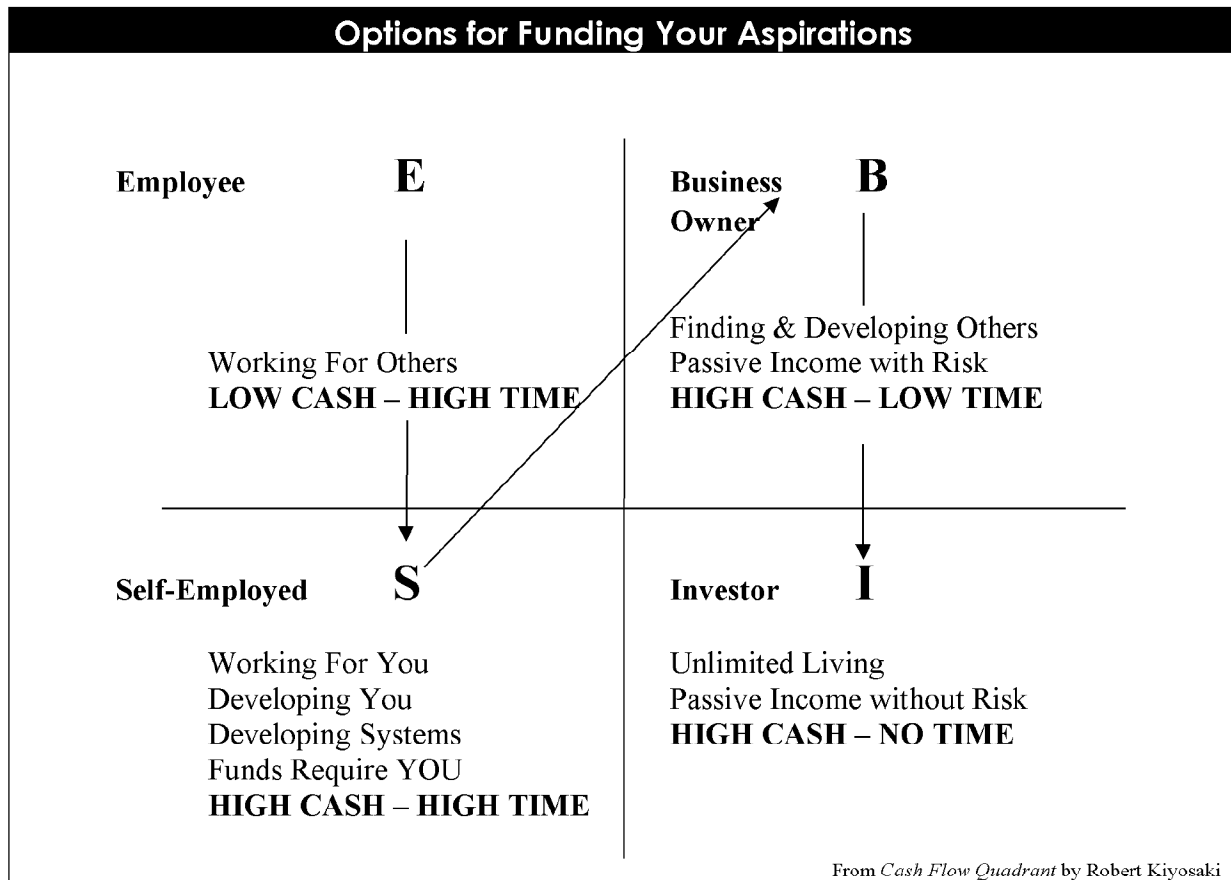
Sure. "**Vital stuff**" must be done, however, that's not the real issue! The key issue is...**who's** going to do it? The moment you begin to think of time as precious and priceless, the **wealthier** you will become!



Your **willingness** to comprehend and adhere to this simple diagram will be the difference between massive success, mediocrity, and dismal failure.

# LIVING AN ABUNDANT LIFE

If you want to live abundantly then you must generate enough **passive** income to fund the life you aspire!



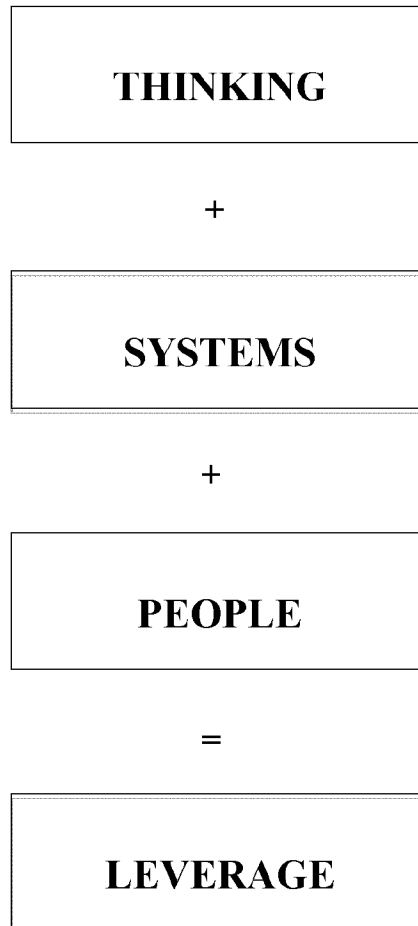
The only options that truly allow for an **abundant life** are on the right side of the graph. If you are an “employee” of someone else, your salary will be limited by the amount your “boss” is willing to pay. If you are “self-employed”, your income will be limited by the number of hours you are willing and able to invest “in” your business.

**Note:** If you truly wish to fund an unlimited life, you must **choose** a career that allows the opportunity to leverage off others so you can generate passive income.

**(Great News: A career in real estate sales lends itself to the right side of the graph.)**

# GETTING WEALTHY

*There is only one success, to be able to spend your life in your own way!*



First you must **think** the way an abundant entrepreneur thinks

Second you must establish **systems** to operate effectively and efficiently

Third you must find and attract **people** who are willing and able to drive your systems

**TRUTH:** Leverage is the key to abundance!

## LET'S REVIEW

**So, why do you want to delegate?**

**Raise your right hand and repeat after me:**

Because...

1. I must make the most effective/efficient use of **my** time!
2. I must operate at my highest and best use at all times!
3. I must eliminate peak and valley results!
4. I must build a business that funds an abundant life!
5. I must be fully leveraged to create the wealth I deserve!

*Now that you understand and **accept** these as  
your rules, we can move forward!*

# ORGANIZATIONAL EVALUATION

*It's either, you do or you delegate; the choice is yours!*

Abundance requires being **completely** leveraged. Thus, it's mandatory that you progressively delegate the tasks of the operational model to a complete and highly functional staff.

## **The Eight Key Positions of an Abundant Agent:**

### **Dollar Productive Positions:**

1. Listing Specialist
2. Buyer Specialist

### **Administrative Positions:**

3. Team Leader
4. Listing Coordinator
5. Closing Coordinator
6. Marketing Coordinator
7. Administrative Assistant
8. Runner

**You are 8 hires away from being completely leveraged!**

## **Do You Own a Business or a Job?**

How many of the key positions do you currently hold?\_\_\_\_\_

How many of the positions are being totally neglected?\_\_\_\_\_

How many are filled by **talented people** you **consistently** hold accountable?\_\_\_\_\_

**TRUTH:** Your answers to the above questions reveal how **leveraged** you are and whether you own a business or a job.

# DON'T BE TYPICAL

*A chain is only as strong as its weakest link!*

Following is an example of how **typical salespeople** assemble a team:

## **Don't be typical!**

*I desperately need someone for this position (because I don't want to do it).*

*Hey you seem capable. Will you work on the cheap?*

*Great, the job is yours!*

*I assume you know what to do! Or Go to this class, he'll tell you what to do.*

*Call me if there is a problem.*

*Hurray! I'm freeeeeeeeee!*

Don't just hire, abdicate, and hope for the best! Your goal is to assemble a **world-class** staff of highly functional, self-managed professionals capable of **replacing** you.

## **The 5 Biggest Mistakes Agents Make When Adding Staff:**

1. Hire to Soon (expanded inefficiencies)
2. Hire the Wrong Person (no hiring plan or system)
3. Provide Little or No Staff Development (C-T-A)
4. Abdicate Position Immediately After Filling (earn the right)
5. Refuse to Create a "Team" Environment (me to we)

**Avoid these pitfalls and you'll be well on your way to reaching your potential and living a life of abundance!**

### **REMEMBER:**

The third and highest form of leverage is **succeeding through others**. However, you must be willing to follow a proven hiring system **and** provide complete staff development to attract and maintain the relationships required for long-term success.

# WHEN TO MAKE A HIRE

*Just because you can doesn't mean you should!*

A common question is, “When should I make a hire?”

## **Make a hire only when...**

1. ... you want to see your career and life move to the next level (you have a passion to progress)
2. ...you are as effective and efficient as YOU can be with the hours you've allotted to your career (vital “stuff” is keeping you from dollar productive activities).
3. ...you have mastered the art of proactively generating leads (you are a proven and proactive lead generator).
4. ...you have developed duplicable systems that can be delegated (your results are by design and not by accident).

## **Remember:**

Going to the “next level” **requires** one of two things:

You personally doing more

or

You leveraging yourself through others

The **choice** you make will determine whether you ultimately build a “business” or forever keep a “job”!



# WHO TO HIRE FIRST

*There is a method to the madness!*

**The order of delegation is as follows:**

- First – Vital **Administrative** Activities
- Second - Vital **Buyer** Dollar-Productive Activities
- Third - Vital **Listing** Dollar-Productive Activities

<b>Tier-1: Business = 50 hours</b>	<b>You = 50 hours</b>
You	
<b>Tier-2: Business = 90 hours</b>	<b>You = 50 hours</b>
You	
Transaction Coordinator	
<b>Tier-3: Business = 140 hours</b>	<b>You = 50 hours</b>
You, Buyer Specialist	
Transaction Coordinator	
<b>Tier-4: Business = 200 – 250 hours</b>	<b>You = 50 hours</b>
You, Buyer Specialist(s)	
Listing Coordinator, Closing Coordinator, Runner	
<b>Tier-5: Business = 240 – 300 hours</b>	<b>You = 50 hours</b>
You, Buyer Specialist(s)	
Listing Coordinator, Closing Coordinator, Marketing Coordinator, Runner	
<b>Tier-6: Business = 280 – 430 hours</b>	<b>You = 30 hours</b>
You, Listing Specialist(s), Buyer Specialist(s)	
Listing Coordinator, Closing Coordinator, Marketing Coordinator, Administrative Assistant, Runner	
<b>Tier-7: Business = 330 – 550 hours</b>	<b>You = 5 hours</b>
Team Leader, Listing Specialist(s), Buyer Specialist(s)	
Listing Coordinator, Closing Coordinator, Marketing Coordinator, Administrative Assistant, Runner, Ancillary Businesses	
<b>Tier-8:</b>	<b>Business Summit</b>
Agent Franchising – Passive Income Via Franchising SYSTEMS for a Tier-7 business	

# **TALENT IS THE KEY!**

*Systems run the business; people run the systems!* Gerber

You are interested in filling **each staff position** with a highly qualified and motivated professional seeking a long-term career **partnership**, not an under qualified and unmotivated employee searching for a weekly paycheck.

**Instead of settling for just anyone, go on a proactive search for talent!**

## **Who is "Talent"?**

Someone who is a **superb match for the job description** AND possesses the knowledge, skills, dispositions, and behavioral style required by the position.

**Finding and attracting talent requires time, energy, effort, & patience.**

**"That sounds expensive!"**

**Think of it this way:**

IS IT...

When I have the money I will hire talent!

or

When I hire talent, I will have the money!

**IT'S YOUR DECISION!!**

## **COST vs. RETURN**

Most agents who consider becoming employers believe that hiring someone will solely cost them money. This is only true if you hire the wrong person.

### **Never Look At Cost; Always Look At Return!**

Full Time Coordinator:	\$ 45,000
Minimum ROI (30%)	<u>x 1.30</u>
Income Needed	\$58,500
Commission (1/2 side)	<u>÷ .03</u>
Closed Production	\$1,950,000
Average Sales Price	<u>÷ \$165,000</u>
Transactions needed	<u>12</u> (One per month)

**Question:** Can you generate one transaction per month, beyond your current production, by delegating your administrative activities?

If, "Yes": Congratulations, you just made a minimum 30% on your investment

If, "No": Don't make the hire and SPAR to improve your LG skills

**TRUTH 1:** Talent isn't cheap and expects to be paid accordingly.

**TRUTH 2:** Talent, if trained and held accountable, will take ownership of their position.

**TRUTH 3:** Talent will free your time, allowing you to focus on making more money and seeking further opportunities.

# **FIRST THINGS FIRST**

*To get the right person, you must first create a vision of the right person!*

Since *Talent* is defined as, *someone who is a superb match for the job description*, it is **impossible** to hire talent without a job description! Thus, before anything else, you must create an organizational chart along with **job descriptions** for all positions identified on the chart.

***Job Description*** – a specific list of **vital activities** for the position.

In addition to finding someone who is a superb match for the job description, you are also searching for someone who is **competent** to fill each position.

**Competent candidates** are those who not only possess the required knowledge, skills, and dispositions, but also are willing to be held **accountable** to pre-established performance standards.

## **Key Competencies:**

***Knowledge*** – Appropriate education, licensing, & understanding

***Skills*** – The ability to perform to the standards of the job

***Dispositions*** – Desired qualities of mind and character

***Performance Standards*** – Defined by the desired results for the position

**NOTE:** When hiring someone to fill a leadership position (TL, LS, BS) you must look beyond talent. The person must be **mature** enough for the position, **credible** enough for the position, and possess a high level of **integrity**. Talent alone will allow one to master the tasks of the role but won't, by itself, inspire followership.

**TRUTH:** Assembling job descriptions along with key competencies provide a clear definition of the **right person** for each position.

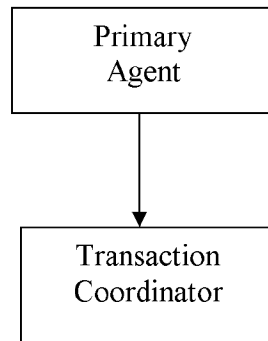
**Following are examples of organizational charts,  
job descriptions, and key competencies**

## Organizational Chart

*Tier-2*

### Team Members:

Primary Agent + Transaction Coordinator



## **JOB DESCRIPTIONS**

### *Tier-2*

#### **Primary Agent:**

Provide Mission and Vision (T&D)  
Prepare/Revise Economic, Operational and Organizational Models (T&D)  
Recruit Team Members (T&D)  
Train Team Members (T&D)  
Consult Team Members (T&D)  
Prepare Team Goals and Hold Team Accountable to the Goals (T&D)  
Hold Weekly Team Meetings (T&D)  
Review Monthly Financial Statements (T&D)  
Pay Bills (T&D)  
Make Deposits (T&D)  
Memorize and Internalize Listing Scripts (T&D)  
Memorize and Internalize Buyer Scripts (T&D)  
Attend Closings (S)  
Review all Closing Documents (S)  
Review Title Commitments and HUD Statements (S)  
Prepare Amendments and Negotiate Repairs for Sellers (S)  
Deliver Contracts (S)  
Present Offers and Negotiate Contracts for Sellers (S)  
Proactively Solicit Multiple Offers (S)  
Review Inspection Reports and Prepare/Negotiate Amendments for Buyers (S)  
Make all Follow-up Calls to Sellers (S)  
Make all Follow-up Calls to Buyers (S)  
Prepare Weekly Client Updates (e-mail if applicable) (S)  
Obtain Loan Payoff Information from Seller (S)  
Obtain HOA Information from Seller (S)  
Deliver Home Flyers (S)  
Make Separate Set of House Keys (S)  
Place/Remove Lockboxes (S)  
Place/Remove Signs (S)  
Take Pictures of Interior/Exterior (S)  
Take Room Measurements and Complete MLS Input Sheet (S)  
Attend all Listing Conversations (LC)  
Confirm Listing Appointments (LC)  
Prepare Listing Agreement & Related Addenda (LC)  
Deliver Pre-Listing Guides/DVD's (LC)  
Prepare Pricing Tools (LC)  
Complete Pre-Listing Questionnaire (LC)  
Write Offers and Negotiate Contracts for Buyers (LC)  
Show Homes to "A" Buyers (LC)  
Prepare Consultant Showing Packages for Buyers (LC)  
Search MLS and FSBO Inventories for Homes (LC)  
Verify Buyers' Price-Range with Lender (LC)  
Put all Buyers through Buyers Process (LC)  
Confirm Buyer Appointments (LC)  
Follow-up on all Seller Leads (LG)  
Visit For Sale by Owners (LG)  
Call Expired Listings (LG)  
Call/Visit Neighbors around "Just Sold" Properties (LG)  
Call into Farm Areas (LG)  
Follow-up on all Buyer Leads (LG)  
Answer/Follow-up on all Buyer Sign Calls (LG)  
Hold Open Houses (LG)  
Call/Visit Neighbors around "Just Listed" Properties (LG)  
Call Apartment Complexes (LG)

**Transaction Coordinator:**

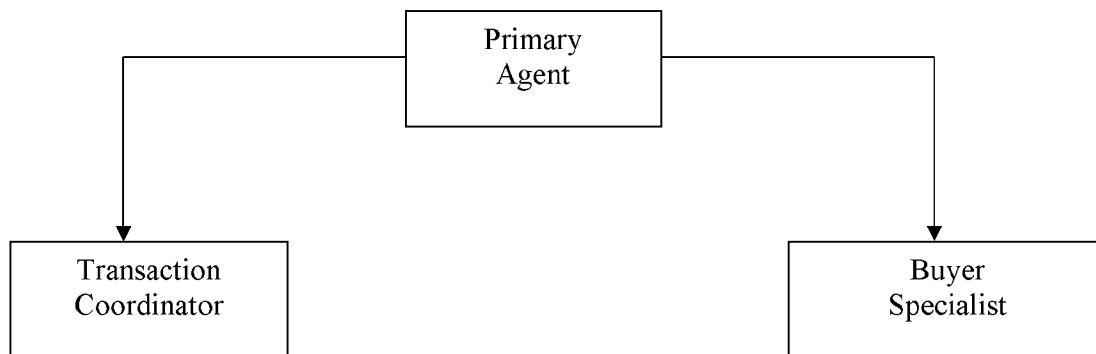
Attend Weekly Team Meeting (T&D)  
Mail Customer Surveys (S)  
Communicate with Title Company and Buyer's Agent (S)  
Schedule Closings with Sellers (S)  
Schedule Home Cleanings (if necessary) (S)  
Copy Repair Invoices for File (S)  
Schedule Home Inspections with Sellers (S)  
Solicit Feedback on Showings (S)  
Supply Broker with all Contracts, Addenda and Notices (S)  
Inform Showing Service of Showing Instructions (S)  
Input/Update Listing in MLS (Change Status) (S)  
Create Listing Files (S)  
Mail Appropriate Letters/Notes to Sellers (S)  
Assemble Consultant's Listing Tools for Listing Conversations (LC)  
e-mail pre-listing video (LC)  
Mail Homestead Exemption Forms to Buyers (S)  
Mail HUD 1 Statements to Buyers (S)  
Coordinate Closing Gifts for Buyers (S)  
Secure Property Owner's Insurance & Home Warranty (S)  
Contact Mortgage/Title Company on Weekly Basis (S)  
Set Closing Dates and Times for Buyers (S)  
Deliver Amendments to Mortgage/Title Company (if necessary) (S)  
Check Home's Insurability with Insurance Company (S)  
Notify Listing Agents of Inspection Times (S)  
Schedule Inspections for Buyers (S)  
Supply Broker with all Contracts, Addenda and Notices (S)  
Open Title (S)  
e-mail Offers/Counter-Offers to Listing Agents (LC)  
Schedule Showings (LC)  
Call Listing Agents to Verify Availability (LC)  
Mail Appropriate Letters/Notes to Buyers (LC)  
Create Sales Files (LC)  
Assemble Consultant's Buyer Tools for Buyer Conversations (LC)  
Order and Mail "Just Sold" Cards (S)  
Order and Mail "Just Listed" Cards (S)  
Update Web Site with New Listings (Change Status) (S)  
Write/Place Home Ads (S)  
e-mail Home Flyers to Area Agents (S)  
Create/Order Home Flyers (S)  
Assemble/Coordinate Pre-Listing Guides (LC)  
Maintain Social Networks (LG)  
Maintain Database Management Program (LG)  
Maintain Long-Term Follow-up Program (LG)  
Maintain Short-Term Follow-up Program (LG)  
Create/Update Ads on Craigslist (LG)  
Prepare/Assemble FSBO Items of Value (LG)  
Prepare Daily Call List (LG)  
Coordinate Open Houses (LG)  
Coordinate Geographic Farm Mailers (LG)  
Distribute Web Site and e-mail Leads (LG)  
Answer all Incoming Phone Calls (OA)  
Update Office Voice Message Daily (OA)  
Check Office e-mail (OA)  
Make Copies (OA)  
Check/Sort Mail (OA)  
Order/Maintain Office Supplies (OA)  
Back-up Computer Files on a Weekly Basis (OA)  
Create/Update Vendor List (OA)

## Organizational Chart

*Tier-3 (Triangular Model)*

### Team Members:

Primary Agent + Buyer Specialist + Transaction Coordinator





## **JOB DESCRIPTIONS**

### *Tier-3*

#### **Primary Agent:**

Provide Mission and Vision (T&D)  
Prepare/Revise Economic, Operational and Organizational Models (T&D)  
Recruit Team Members (T&D)  
Train Team Members (T&D)  
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Complete Pre-Listing Questionnaire (LC)  
Follow-up on all Seller Leads (LG)  
Call Expired Listings (LG)  
Call/Visit Neighbors around "Just Sold" Properties (LG)  
Call into Farm Areas (LG)

#### **Buyer Specialist:**

Attend Weekly Team Meeting (T&D)  
Memorize and Internalize Buyer Scripts (T&D)  
Attend Closings for Buyers (S)  
Review all Closing Documents (S)  
Set Closing Dates and Times for Buyers (S)  
Review Inspection Reports and Prepare/Negotiate Amendments for Buyers (S)  
Make all Follow-up Calls to Buyers (S)  
Deliver Contracts (S)  
Write Offers and Negotiate Contracts for Buyers (LC)  
Show Homes to "A" Buyers (LC)  
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Verify Buyers' Price-Range with Lender (LC)  
Put all Buyers through Buyers Process (LC)  
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**Transaction Coordinator:**

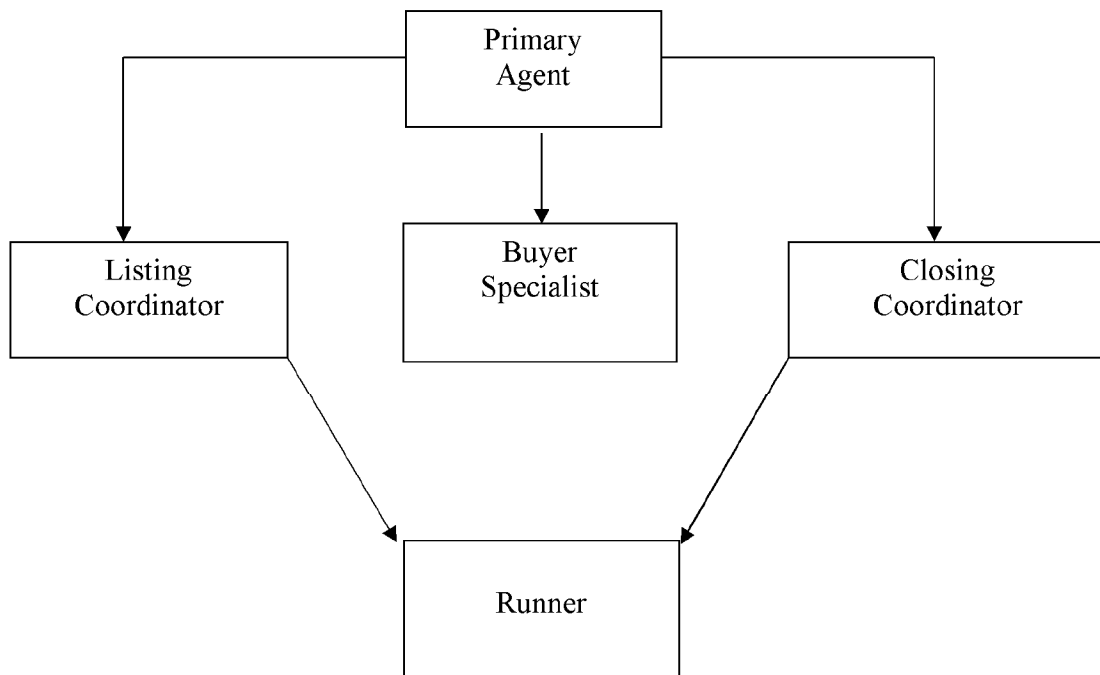
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 Schedule Home Cleanings (if necessary) (S)  
 Copy Repair Invoices for File (S)  
 Schedule Home Inspections with Sellers (S)  
 Solicit Feedback on Showings (S)  
 Supply Broker with all Contracts, Addenda and Notices (S)  
 Inform Showing Service of Showing Instructions (S)  
 Input/Update Listing in MLS (Change Status) (S)  
 Create Listing Files (S)  
 Mail Appropriate Letters/Notes to Sellers (S)  
 Assemble Consultant's Listing Tools for Listing Conversations (LC)  
 e-mail pre-listing video (LC)  
 Mail Homestead Exemption Forms to Buyers (S)  
 Mail HUD 1 Statements to Buyers (S)  
 Mail Customer Surveys (S)  
 Coordinate Closing Gifts for Buyers (S)  
 Secure Property Owner's Insurance & Home Warranty (S)  
 Contact Mortgage/Title Company on Weekly Basis (S)  
 Deliver Amendments to Mortgage/Title Company (if necessary) (S)  
 Check Home's Insurability with Insurance Company (S)  
 Notify Listing Agents of Inspection Times (S)  
 Schedule Inspections for Buyers (S)  
 Supply Broker with all Contracts, Addenda and Notices (S)  
 Open Title (S)  
 e-mail Offers/Counter-Offer to Listing Agents (LC)  
 Schedule Showings (LC)  
 Call Listing Agents to Verify Availability (LC)  
 Mail Appropriate Letters/Notes to Buyers (LC)  
 Create Sales Files (LC)  
 Assemble Consultant's Buyer Tools for Buyer Conversations (LC)  
 Order and Mail "Just Sold" Cards (S)  
 Order and Mail "Just Listed" Cards (S)  
 Update Web Site with New Listings (Change Status) (S)  
 Write/Place Home Ads (S)  
 e-mail Home Flyers to Area Agents (S)  
 Create/Order Home Flyers (S)  
 Assemble/Coordinate Pre-Listing Guides (LC)  
 Maintain Social Networks (LG)  
 Maintain Database Management Program (LG)  
 Maintain Long-Term Follow-Up Program (LG)  
 Maintain Short-Term Follow-Up Program (LG)  
 Create/Update Ads on Craigslist (LG)  
 Prepare/Assemble FSBO Items of Value (LG)  
 Prepare Daily Call List (LG)  
 Coordinate Open Houses (LG)  
 Coordinate Geographic Farm Mailers (LG)  
 Distribute Web Site and e-mail Leads (LG)  
 Answer all Incoming Phone Calls (OA)  
 Update Office Voice Message Daily (OA)  
 Check Office e-mail (OA)  
 Make Copies (OA)  
 Check/Sort Mail (OA)  
 Order/Maintain Office Supplies (OA)  
 Back-up Computer Files on a Weekly Basis (OA)  
 Create/Update Vendor List (OA)

## Organizational Chart

*Tier-4*

### Team Members:

Primary Agent + Buyer Specialist + Listing Coordinator +  
Closing Coordinator + Runner



# **JOB DESCRIPTIONS**

## *Tier-4*

### **Primary Agent:**

Provide Mission and Vision (T&D)  
Prepare/Revise Economic, Operational and Organizational Models (T&D)  
Recruit Team Members (T&D)  
Train Team Members (T&D)  
Consult Team Members (T&D)  
Prepare Team Goals and Hold Team Accountable to the Goals (T&D)  
Hold Weekly Team Meetings (T&D)  
Review Monthly Financial Statements (T&D)  
Pay Bills (T&D)  
Make Deposits (T&D)  
Memorize and Internalize Listing Scripts (T&D)  
Attend Closings for Sellers (S)  
Review Title Commitments and HUD Statements (S)  
Prepare Amendments and Negotiate Repairs for Sellers (S)  
Present Offers and Negotiate Contracts for Sellers (S)  
Proactively Solicit Multiple Offers (S)  
Make all Follow-up Calls to Sellers (S)  
Attend all Listing Conversations (LC)  
Prepare Pricing Tools (LC)  
Follow-up on all Seller Leads (LG)  
Call Expired Listings (LG)  
Call/Visit Neighbors around "Just Sold" Properties (LG)  
Call into Farm Areas (LG)

### **Buyer Specialist:**

Attend Weekly Team Meeting (T&D)  
Memorize and Internalize Buyer Scripts (T&D)  
Attend Closings for Buyers (S)  
Review all Closing Documents (S)  
Review Inspection Reports and Prepare/Negotiate Amendments for Buyers (S)  
Make all Follow-up Calls to Buyers (S)  
Write Offers and Negotiate Contracts for Buyers (LC)  
Show Homes to "A" Buyers (LC)  
Search MLS and FSBO Inventories for Homes (LC)  
Verify Buyers' Price-Range with Lender (LC)  
Put all Buyers through Buyers Process (LC)  
Follow-up on all Buyer Leads (LG)  
Answer/Follow-up on all Buyer Sign Calls (LG)  
Visit For Sale by Owners (LG)  
Hold Open Houses (LG)  
Call/Visit Neighbors around "Just Listed" Properties (LG)

### Listing Coordinator:

Attend Weekly Team Meeting (T&D)  
Mail Seller Surveys (S)  
Communicate with Title Company and Buyer's Agent (S)  
Schedule Closings with Sellers (S)  
Schedule Home Cleanings (if necessary) (S)  
Copy Repair Invoices for File (S)  
Schedule Home Inspections with Sellers (S)  
Prepare Weekly Client Updates (e-mail if applicable) (S)  
Solicit Feedback on Showings (S)  
Update Web Site with New Listings (Change Status) (S)  
Write/Place Home Ads (S)  
e-mail Home Flyers to Area Agents (S)  
Create/Order Home Flyers (S)  
Order and Mail "Just Listed" Cards (S)  
Obtain Loan Payoff Information from Seller (S)  
Obtain HOA Information from Seller (S)  
Supply Broker with all Contracts, Addenda and Notices (S)  
Inform Showing Service of Showing Instructions (S)  
Input/Update Listing in MLS (Change Status) (S)  
Create Listing Files (S)  
Mail Appropriate Letters/Notes to Sellers (S)  
Prepare Listing Agreement & Related Addenda (LC)  
Assemble Consultant's Listing Tools for Listing Conversations (LC)  
Confirm Listing Appointments (LC)  
Assemble/Coordinate Pre-Listing Guides (LC)  
e-mail pre-listing video (LC)  
Complete Pre-Listing Questionnaire (LC)  
Maintain Social Networks (LG)  
Coordinate Geographic Farm Mailers (LG)  
Answer all Incoming Phone Calls (OA)  
Update Office Voice Message Daily (OA)  
Back-up Computer Files on a Weekly Basis (OA)  
Make Copies (OA)

### Runner:

Attend Weekly Team Meeting (T&D)  
Deliver Contracts (S)  
Deliver Amendments to Mortgage/Title Company (if necessary) (S)  
Deliver Home Flyers (S)  
Make Separate Set of House Keys (S)  
Place/Remove Lockboxes (S)  
Place/Remove Signs (S)  
Take Pictures of Interior/Exterior (S)  
Take Room Measurements and Complete MLS Input Sheet (S)  
Deliver Pre-Listing Guides/DVD's (LC)  
Locate For Sale By Owners (LG)

## Closing Coordinator:

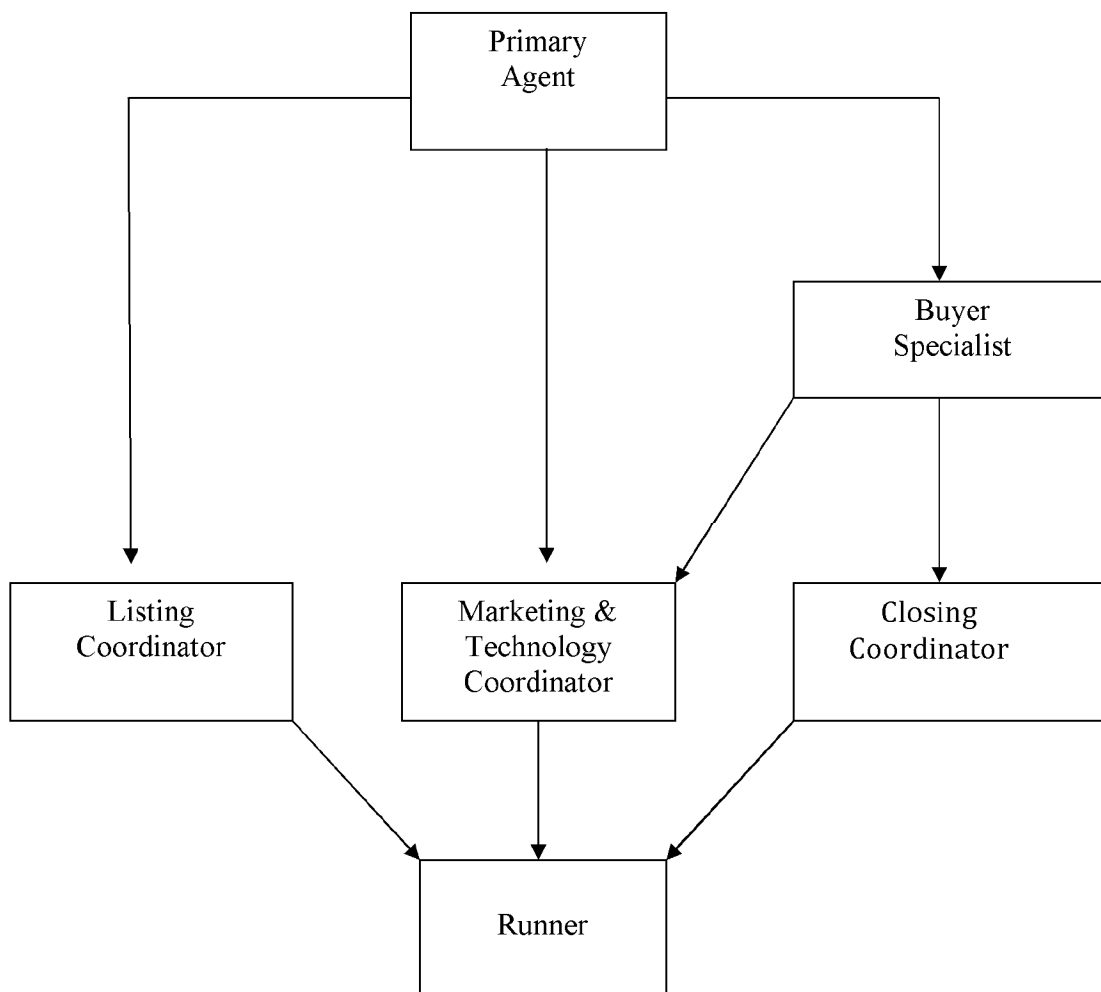
Attend Weekly Team Meeting (T&D)  
Make Copies (S)  
Mail Buyer Surveys (S)  
Mail Homestead Exemption Forms to Buyers (S)  
Mail HUD 1 Statements to Buyers (S)  
Mail Customer Surveys (S)  
Coordinate Closing Gifts for Buyers (S)  
Secure Property Owner's Insurance & Home Warranty (S)  
Contact Mortgage/Title Company on Weekly Basis (S)  
Set Closing Dates and Times for Buyers (S)  
Check Home's Insurability with Insurance Company (S)  
Notify Listing Agents of Inspection Times (S)  
Schedule Inspections for Buyers (S)  
Supply Broker with all Contracts, Addenda and Notices (S)  
Open Title (S)  
e-mail Offers/Counter-Offerers to Listing Agents (LC)  
Schedule Showings (LC)  
Prepare Consultant Showing Packages for Buyers (LC)  
Call Listing Agents to Verify Availability (LC)  
Mail Appropriate Letters/Notes to Buyers (LC)  
Create Sales Files (LC)  
Assemble Consultant's Buyer Tools for Buyer Conversations (LC)  
Confirm Buyer Appointments (LC)  
Order and Mail "Just Sold" Cards (S)  
Maintain Database Management Program (LG)  
Maintain Long-Term Follow-Up Program (LG)  
Maintain Short-Term Follow-Up Program (LG)  
Create/Update Ads on Craigslist (LG)  
Prepare/Assemble FSBO Items of Value (LG)  
Prepare Daily Call List (LG)  
Coordinate Open Houses (LG)  
Distribute Web Site and e-mail Leads (LG)  
Check Office e-mail (OA)  
Make Copies (OA)  
Check/Sort Mail (OA)  
Order/Maintain Office Supplies (OA)  
Create/Update Vendor List (OA)

## Organizational Chart

*Tier-5*

### Team Members:

Primary Agent + Buyer Specialist + Listing Coordinator +  
Closing Coordinator + Marketing Coordinator + Runner



# **JOB DESCRIPTIONS**

## *Tier-5*

### **Primary Agent:**

Provide Mission and Vision (T&D)  
Prepare/Revise Economic, Operational and Organizational Models (T&D)  
Recruit Team Members (T&D)  
Train Team Members (T&D)  
Consult Team Members (T&D)  
Prepare Team Goals and Hold Team Accountable to the Goals (T&D)  
Hold Weekly Team Meetings (T&D)  
Review Monthly Financial Statements (T&D)  
Pay Bills (T&D)  
Make Deposits (T&D)  
Memorize and Internalize Listing Scripts (T&D)  
Attend Closings for Sellers (S)  
Review Title Commitments and HUD Statements (S)  
Prepare Amendments and Negotiate Repairs for Sellers (S)  
Present Offers and Negotiate Contracts for Sellers (S)  
Proactively Solicit Multiple Offers (S)  
Make all Follow-up Calls to Sellers (S)  
Attend all Listing Conversations (LC)  
Prepare Pricing Tools (LC)  
Follow-up on all Seller Leads (LG)  
Call Expired Listings (LG)  
Visit Neighbors around "Just Sold" Properties (LG)  
Call into Farm Areas (LG)

### **Buyer Specialist:**

Attend Weekly Team Meeting (T&D)  
Memorize and Internalize Buyer Scripts (T&D)  
Attend Closings for Buyers (S)  
Review all Closing Documents (S)  
Review Inspection Reports and Prepare/Negotiate Amendments for Buyers (S)  
Make all Follow-up Calls to Buyers (S)  
Write Offers and Negotiate Contracts for Buyers (LC)  
Show Homes to "A" Buyers (LC)  
Search MLS and FSBO Inventories for Homes (LC)  
Verify Buyers' Price-Range with Lender (LC)  
Put all Buyers through Buyers Process (LC)  
Follow-up on all Buyer Leads (LG)  
Answer/Follow-up on all Buyer Sign Calls (LG)  
Visit For Sale by Owners (LG)  
Hold Open Houses (LG)  
Call/Visit Neighbors around "Just Listed" Properties (LG)



**Listing Coordinator:**

Attend Weekly Team Meeting (T&D)  
 Mail Seller Surveys (S)  
 Communicate with Title Company and Buyer's Agent (S)  
 Schedule Closings with Sellers (S)  
 Schedule Home Cleanings (if necessary) (S)  
 Copy Repair Invoices for File (S)  
 Schedule Home Inspections with Sellers (S)  
 Prepare Weekly Client Updates (e-mail if applicable) (S)  
 Solicit Feedback on Showings (S)  
 Obtain Loan Payoff Information from Seller (S)  
 Obtain HOA Information from Seller (S)  
 Supply Broker with all Contracts, Addenda and Notices (S)  
 Inform Showing Service of Showing Instructions (S)  
 Input Listing in MLS (Change Status) (S)  
 Create Listing Files (S)  
 Mail Appropriate Letters/Notes to Sellers (S)  
 Prepare Listing Agreement & Related Addenda (LC)  
 Assemble Consultant's Listing Tools for Listing Conversations (LC)  
 Confirm Listing Appointments (LC)  
 Complete Pre-Listing Questionnaire (LC)  
 Answer all Incoming Phone Calls (OA)  
 Update Office Voice Message Daily (OA)  
 Back-up Computer Files on a Weekly Basis (OA)

**Marketing Coordinator:**

Attend Weekly Team Meeting (T&D)  
 Call Neighbors Around Just Listed Properties (S)  
 Order and Mail "Just Listed" Cards (S)  
 Call Neighbors Around Just Sold Properties  
 Order and Mail "Just Sold" Cards (S)  
 Update Web Site with New Listings (Change Status) (S)  
 Write/Place Home Ads (S)  
 e-mail Home Flyers to Area Agents (S)  
 Create/Order Home Flyers (S)  
 Assemble/Coordinate Pre-Listing Guides (LC)  
 e-mail pre-listing video (LC)  
 Maintain Social Networks (LG)  
 Maintain Database Management Program (LG)  
 Maintain Long-Term Follow-Up Program (LG)  
 Maintain Short-Term Follow-Up Program (LG)  
 Create/Update Ads on Craigslist (LG)  
 Prepare/Assemble FSBO Items of Value (LG)  
 Prepare Daily Call List (LG)  
 Coordinate Open Houses (LG)  
 Coordinate Geographic Farm Mailers (LG)  
 Distribute Web Site and e-mail Leads (LG)  
 Manage team image and brand awareness (LG)  
 Check Office e-mail (OA)  
 Create/Update Vendor List (OA)

**Closing Coordinator:**

- Attend Weekly Team Meeting (T&D)
- Mail Buyer Surveys (S)
- Mail Homestead Exemption Forms to Buyers (S)
- Mail IIUD 1 Statements to Buyers (S)
- Mail Customer Surveys (S)
- Coordinate Closing Gifts for Buyers (S)
- Secure Property Owner's Insurance & Home Warranty (S)
- Contact Mortgage/Title Company on Weekly Basis (S)
- Set Closing Dates and Times for Buyers (S)
- Check Home's Insurability with Insurance Company (S)
- Notify Listing Agents of Inspection Times (S)
- Schedule Inspections for Buyers (S)
- Supply Broker with all Contracts, Addenda and Notices (S)
- Open Title (S)
- e-mail Offers/Counter-Offer to Listing Agents (LC)
- Schedule Showings (LC)
- Prepare Consultant Showing Packages for Buyers (LC)
- Call Listing Agents to Verify Availability (LC)
- Mail Appropriate Letters/Notes to Buyers (LC)
- Create Sales Files (LC)
- Assemble Consultant's Buyer Tools for Buyer Conversations (LC)
- Confirm Buyer Appointments (LC)
- Make Copies (OA)
- Check/Sort Mail (OA)
- Order/Maintain Office Supplies (OA)

**Runner:**

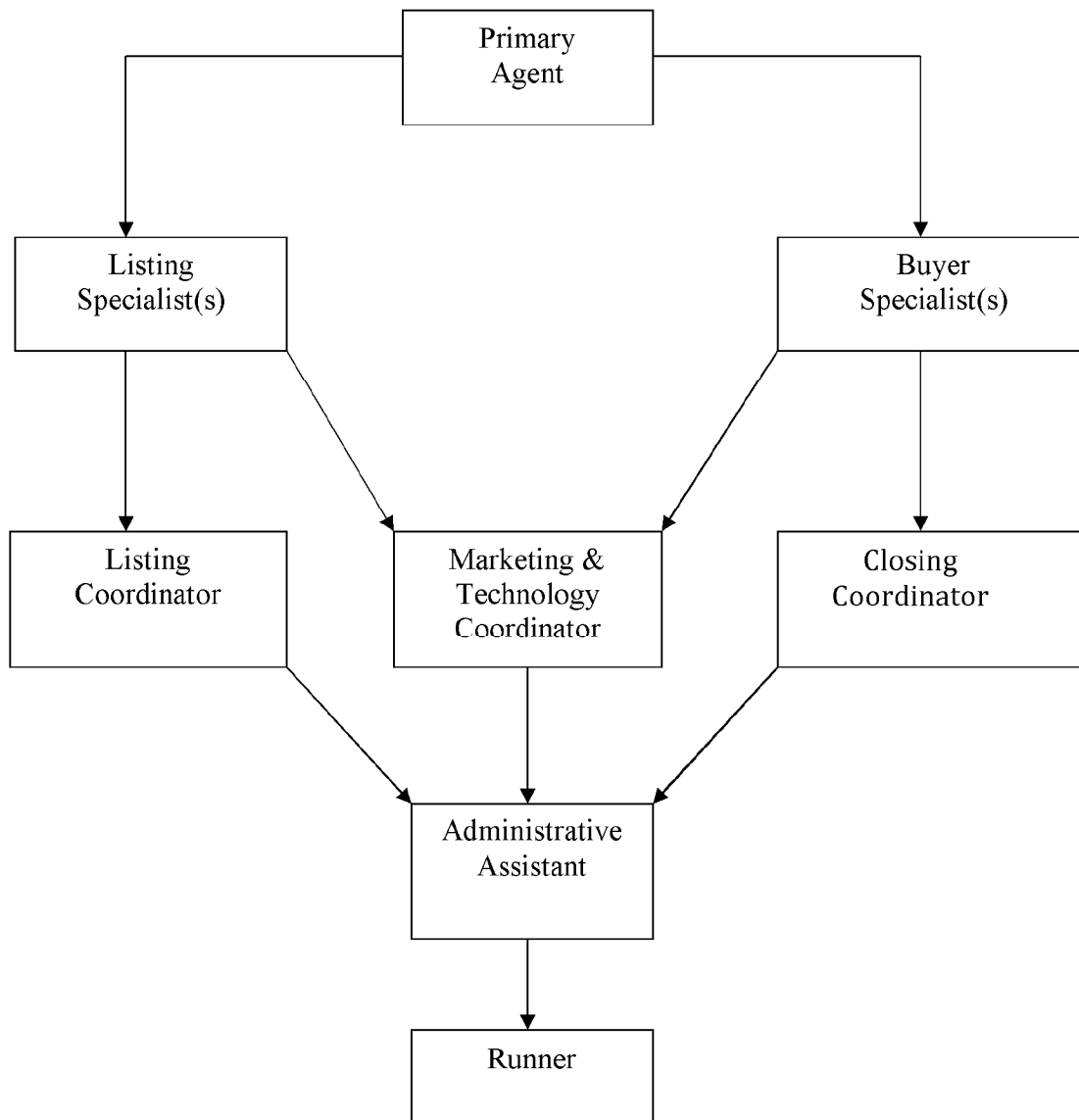
- Attend Weekly Team Meeting (T&D)
- Deliver Contracts (S)
- Deliver Amendments to Mortgage/Title Company (if necessary) (S)
- Deliver Home Flyers (S)
- Make Separate Set of House Keys (S)
- Place/Remove Lockboxes (S)
- Place/Remove Signs (S)
- Take Pictures of Interior/Exterior (S)
- Take Room Measurements and Complete MLS Input Sheet (S)
- Deliver Pre-Listing Guides/DVD's (LC)
- Locate For Sale By Owners (LG)

# Organizational Chart

*Tier-6*

## **Team Members:**

Primary Agent + Listing Specialist + Buyer Specialist + Listing Coordinator + Closing Coordinator + Marketing Coordinator + Administrative Assistant + Runner



# **JOB DESCRIPTIONS**

## *Tier-6*

### **Primary Agent:**

Provide Mission and Vision (T&D)  
Prepare/Revise Economic, Operational and Organizational Models (T&D)  
Recruit Team Members (T&D)  
Train Team Members (T&D)  
Consult Team Members (T&D)  
Prepare Team Goals and Hold Team Accountable to the Goals (T&D)  
Hold Weekly Team Meetings (T&D)  
Review Monthly Financial Statements (T&D)  
Pay Bills (T&D)  
Make Deposits (T&D)

### **Listing Specialist:**

Attend Weekly Team Meeting (T&D)  
Memorize and Internalize Listing Scripts (T&D)  
Attend Closings for Sellers (S)  
Review Title Commitments and HUD Statements (S)  
Prepare Amendments and Negotiate Repairs for Sellers (S)  
Present Offers and Negotiate Contracts for Sellers (S)  
Proactively Solicit Multiple Offers (S)  
Make all Follow-up Calls to Sellers (S)  
Attend all Listing Conversations (LC)  
Prepare Pricing Tools (LC)  
Follow-up on all Seller Leads (LG)  
Call Expired Listings (LG)  
Visit Neighbors around "Just Sold" Properties (LG)  
Call into Farm Areas (LG)

### **Buyer Specialist:**

Attend Weekly Team Meeting (T&D)  
Memorize and Internalize Buyer Scripts (T&D)  
Attend Closings for Buyers (S)  
Review all Closing Documents (S)  
Review Inspection Reports and Prepare/Negotiate Amendments for Buyers (S)  
Make all Follow-up Calls to Buyers (S)  
Write Offers and Negotiate Contracts for Buyers (LC)  
Show Homes to "A" Buyers (LC)  
Search MLS and FSBO Inventories for Homes (LC)  
Verify Buyers' Price-Range with Lender (LC)  
Put all Buyers through Buyers Process (LC)  
Follow-up on all Buyer Leads (LG)  
Answer/Follow-up on all Buyer Sign Calls (LG)  
Visit For Sale by Owners (LG)  
Hold Open Houses (LG)  
Call/Visit Neighbors around "Just Listed" Properties (LG)

**Listing Coordinator:**

- Attend Weekly Team Meeting (T&D)
- Mail Seller Surveys (S)
- Communicate with Title Company and Buyer's Agent (S)
- Schedule Closings with Sellers (S)
- Schedule Home Cleanings (if necessary) (S)
- Copy Repair Invoices for File (S)
- Schedule Home Inspections with Sellers (S)
- Prepare Weekly Client Updates (e-mail if applicable) (S)
- Solicit Feedback on Showings (S)
- Obtain Loan Payoff Information from Seller (S)
- Obtain HOA Information from Seller (S)
- Supply Broker with all Contracts, Addenda and Notices (S)
- Inform Showing Service of Showing Instructions (S)
- Input/Update Listing in MLS (Change Status) (S)
- Create Listing Files (S)
- Mail Appropriate Letters/Notes to Sellers (S)
- Prepare Listing Agreement & Related Addenda (LC)
- Assemble Consultant's Listing Tools for Listing Conversations (LC)
- Confirm Listing Appointments (LC)
- Complete Pre-Listing Questionnaire (LC)

**Marketing Coordinator:**

- Attend Weekly Team Meeting (T&D)
- Call Neighbors Around Just Listed Properties (S)
- Order and Mail "Just Listed" Cards (S)
- Call Neighbors Around Just Sold Properties
- Order and Mail "Just Sold" Cards (S)
- Update Web Site with New Listings (Change Status) (S)
- Write/Place Home Ads (S)
- e-mail Home Flyers to Area Agents (S)
- Create/Order Home Flyers (S)
- Assemble/Coordinate Pre-Listing Guides (LC)
- e-mail pre-listing video (LC)
- Maintain Social Networks (LG)
- Maintain Database Management Program (LG)
- Maintain Long-Term Follow-Up Program (LG)
- Maintain Short-Term Follow-Up Program (LG)
- Create/Update Ads on Craigslist (LG)
- Prepare/Assemble FSBO Items of Value (LG)
- Prepare Daily Call List (LG)
- Coordinate Open Houses (LG)
- Coordinate Geographic Farm Mailers (LG)
- Distribute Web Site and e-mail Leads (LG)
- Manage team image and brand awareness (LG)

**Closing Coordinator:**

- Attend Weekly Team Meeting (T&D)
- Mail Buyer Surveys (S)
- Mail Homestead Exemption Forms to Buyers (S)
- Mail HUD 1 Statements to Buyers (S)
- Mail Customer Surveys (S)
- Coordinate Closing Gifts for Buyers (S)
- Secure Property Owner's Insurance & Home Warranty (S)
- Contact Mortgage/Title Company on Weekly Basis (S)
- Set Closing Dates and Times for Buyers (S)
- Check Home's Insurability with Insurance Company (S)
- Notify Listing Agents of Inspection Times (S)
- Schedule Inspections for Buyers (S)
- Supply Broker with all Contracts, Addenda and Notices (S)
- Open Title (S)
- e-mail Offers/Counter-Offer to Listing Agents (LC)
- Schedule Showings (LC)
- Prepare Consultant Showing Packages for Buyers (LC)
- Call Listing Agents to Verify Availability (LC)
- Mail Appropriate Letters/Notes to Buyers (LC)
- Create Sales Files (LC)
- Assemble Consultant's Buyer Tools for Buyer Conversations (LC)
- Confirm Buyer Appointments (LC)

**Administrative Assistant:**

- Attend Weekly Team Meeting (T&D)
- Answer all Incoming Phone Calls (OA)
- Check Office e-mail (OA)
- Update Office Voice Message Daily (OA)
- Make Copies (OA)
- Check/Sort Mail (OA)
- Order/Maintain Office Supplies (OA)
- Back-up Computer Files on a Weekly Basis (OA)
- Create/Update Vendor List (OA)

**Runner:**

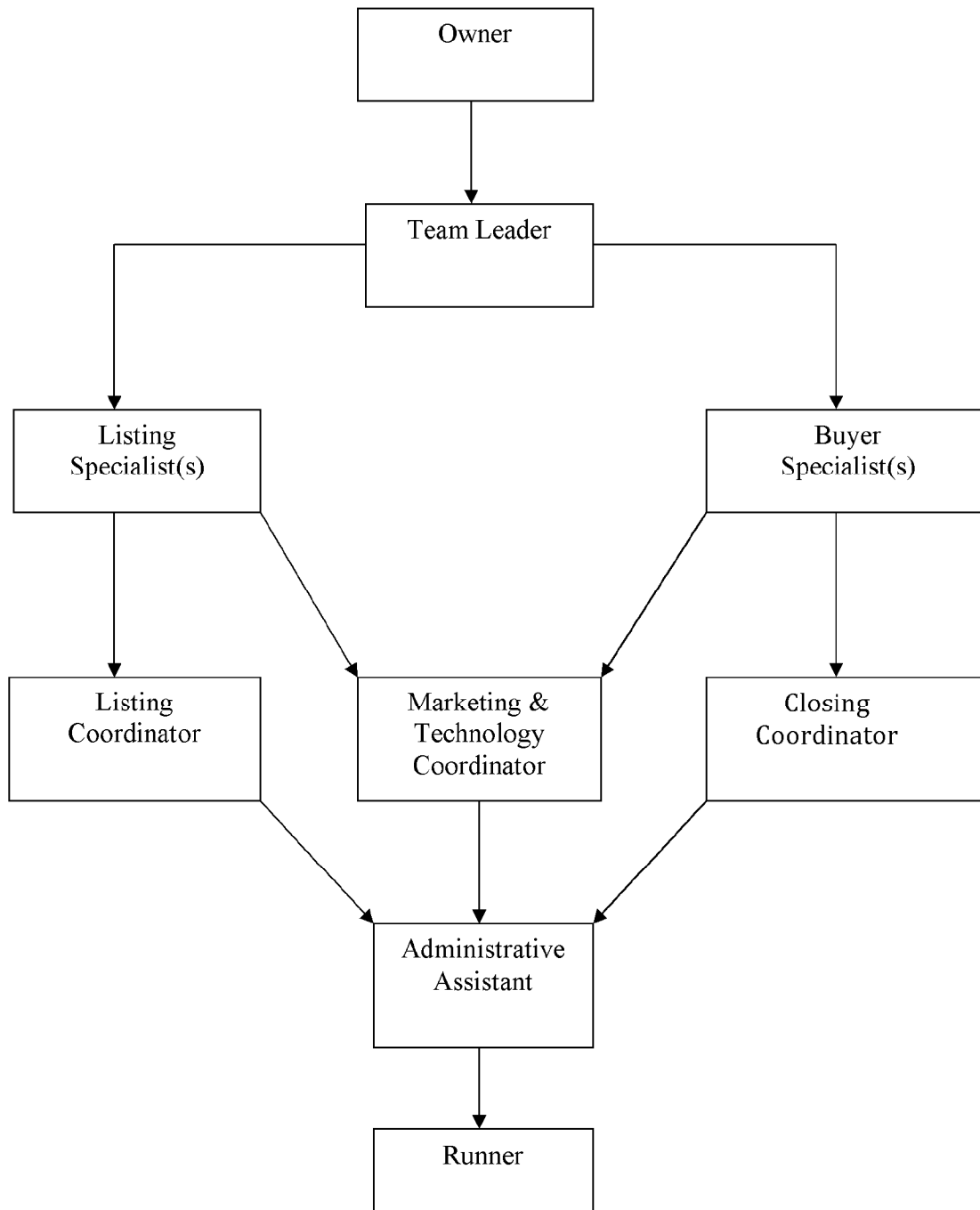
- Attend Weekly Team Meeting (T&D)
- Deliver Contracts (S)
- Deliver Amendments to Mortgage/Title Company (if necessary) (S)
- Deliver Home Flyers (S)
- Make Separate Set of House Keys (S)
- Place/Remove Lockboxes (S)
- Place/Remove Signs (S)
- Take Pictures of Interior/Exterior (S)
- Take Room Measurements and Complete MLS Input Sheet (S)
- Deliver Pre-Listing Guides/DVD's (LC)
- Locate For Sale By Owners (LG)

# Organizational Chart

*Tier-7*

## Team Members:

Team Leader + Listing Specialist + Buyer Specialist + Listing Coordinator + Closing Coordinator + Marketing Coordinator + Administrative Assistant + Runner



# **JOB DESCRIPTIONS**

## *Tier-7*

### **Team Leader:**

Provide Mission and Vision (T&D)  
Prepare/Revise Economic, Operational and Organizational Models (T&D)  
Recruit Team Members (T&D)  
Train Team Members (T&D)  
Consult Team Members (T&D)  
Prepare Team Goals and Hold Team Accountable to the Goals (T&D)  
Hold Weekly Team Meetings (T&D)  
Review Monthly Financial Statements (T&D)  
Pay Bills (T&D)  
Make Deposits (T&D)

### **Listing Specialist:**

Attend Weekly Team Meetings (T&D)  
Memorize and Internalize Listing Scripts (T&D)  
Attend Closings for Sellers (S)  
Review Title Commitments and HUD Statements (S)  
Prepare Amendments and Negotiate Repairs for Sellers (S)  
Present Offers and Negotiate Contracts for Sellers (S)  
Proactively Solicit Multiple Offers (S)  
Make all Follow-up Calls to Sellers (S)  
Attend all Listing Conversations (LC)  
Prepare Pricing Tools (LC)  
Follow-up on all Seller Leads (LG)  
Call Expired Listings (LG)  
Visit Neighbors around “Just Sold” Properties (LG)  
Call into Farm Areas (LG)

### **Buyer Specialist:**

Attend Weekly Team Meeting (T&D)  
Memorize and Internalize Buyer Scripts (T&D)  
Attend Closings for Buyers (S)  
Review all Closing Documents (S)  
Review Inspection Reports and Prepare/Negotiate Amendments for Buyers (S)  
Make all Follow-up Calls to Buyers (S)  
Write Offers and Negotiate Contracts for Buyers (LC)  
Show Homes to “A” Buyers (LC)  
Search MLS and FSBO Inventories for Homes (LC)  
Verify Buyers’ Price-Range with Lender (LC)  
Put all Buyers through Buyers Process (LC)  
Follow-up on all Buyer Leads (LG)  
Answer/Follow-up on all Buyer Sign Calls (LG)  
Visit For Sale by Owners (LG)  
Hold Open Houses (LG)  
Call/Visit Neighbors around “Just Listed” Properties (LG)



**Listing Coordinator:**

- Attend Weekly Team Meeting (T&D)
- Mail Seller Surveys (S)
- Communicate with Title Company and Buyer's Agent (S)
- Schedule Closings with Sellers (S)
- Schedule Home Cleanings (if necessary) (S)
- Copy Repair Invoices for File (S)
- Schedule Home Inspections with Sellers (S)
- Prepare Weekly Client Updates (e-mail if applicable) (S)
- Solicit Feedback on Showings (S)
- Obtain Loan Payoff Information from Seller (S)
- Obtain HOA Information from Seller (S)
- Supply Broker with all Contracts, Addenda and Notices (S)
- Inform Showing Service of Showing Instructions (S)
- Input/Update Listing in MLS (Change Status) (S)
- Create Listing Files (S)
- Mail Appropriate Letters/Notes to Sellers (S)
- Prepare Listing Agreement & Related Addenda (LC)
- Assemble Consultant's Listing Tools for Listing Conversations (LC)
- Confirm Listing Appointments (LC)
- Complete Pre-Listing Questionnaire (LC)

**Marketing Coordinator:**

- Attend Weekly Team Meeting (T&D)
- Call Neighbors Around Just Listed Properties (S)
- Order and Mail "Just Listed" Cards (S)
- Call Neighbors Around Just Sold Properties
- Order and Mail "Just Sold" Cards (S)
- Update Web Site with New Listings (Change Status) (S)
- Write/Place Home Ads (S)
- e-mail Home Flyers to Area Agents (S)
- Create/Order Home Flyers (S)
- Assemble/Coordinate Pre-Listing Guides (LC)
- e-mail pre-listing video (LC)
- Maintain Social Networks (LG)
- Maintain Database Management Program (LG)
- Maintain Long-Term Follow-Up Program (LG)
- Maintain Short-Term Follow-Up Program (LG)
- Create/Update Ads on Craigslist (LG)
- Prepare/Assemble FSBO Items of Value (LG)
- Prepare Daily Call List (LG)
- Coordinate Open Houses (LG)
- Coordinate Geographic Farm Mailers (LG)
- Distribute Web Site and e-mail Leads (LG)
- Manage team image and brand awareness (LG)

**Closing Coordinator:**

- Attend Weekly Team Meeting (T&D)
- Mail Buyer Surveys (S)
- Mail Homestead Exemption Forms to Buyers (S)
- Mail HUD 1 Statements to Buyers (S)
- Mail Customer Surveys (S)
- Coordinate Closing Gifts for Buyers (S)
- Secure Property Owner's Insurance & Home Warranty (S)
- Contact Mortgage/Title Company on Weekly Basis (S)
- Set Closing Dates and Times for Buyers (S)
- Check Home's Insurability with Insurance Company (S)
- Notify Listing Agents of Inspection Times (S)
- Schedule Inspections for Buyers (S)
- Supply Broker with all Contracts, Addenda and Notices (S)
- Open Title (S)
- e-mail Offers/Counter-Offer to Listing Agents (LC)
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- Prepare Consultant Showing Packages for Buyers (LC)
- Call Listing Agents to Verify Availability (LC)
- Mail Appropriate Letters/Notes to Buyers (LC)
- Create Sales Files (LC)
- Assemble Consultant's Buyer Tools for Buyer Conversations (LC)
- Confirm Buyer Appointments (LC)

**Administrative Assistant:**

- Attend Weekly Team Meeting (T&D)
- Answer all Incoming Phone Calls (OA)
- Check Office e-mail (OA)
- Update Office Voice Message Daily (OA)
- Make Copies (OA)
- Check/Sort Mail (OA)
- Order Supplies (OA)
- Back-up Computer Files on a Weekly Basis (OA)
- Create/Update Vendor List (OA)
- Assist Closing Coordinator and Listing Coordinator as needed

**Runner:**

- Attend Weekly Team Meeting (T&D)
- Deliver Contracts (S)
- Deliver Amendments to Mortgage/Title Company (if necessary) (S)
- Deliver Home Flyers (S)
- Make Separate Set of House Keys (S)
- Place/Remove Lockboxes (S)
- Place/Remove Signs (S)
- Take Pictures of Interior/Exterior (S)
- Take Room Measurements and Complete MLS Input Sheet (S)
- Deliver Pre-Listing Guides/DVD's (LC)
- Locate For Sale By Owners (LG)

## LISTING SPECIALIST

Knowledge	Skills	Dispositions	Performance Standards
Listing Agreement Listing Addenda Pricing R/E Finance Geographic Area MLS Software	Communication Conversation Presentation Negotiation Strategic Analysis Computer Calculator	<b>Intellectual:</b> Intelligence Analysis Skills Judgment Decision Making Conceptual Ability Creativity Pragmatism Leading Edge Education  <b>Personal:</b> Integrity Initiative Organization Planning Charm Self-Awareness Energy Enthusiasm Independence  <b>Interpersonal:</b> First Impression Likability Listening Team Player Customer Focus Assertiveness Persuasion  <b>Leadership:</b> Inspiration Ambition Goal Setting Accountable	*Attend all closings  *Present all offers in person w/in 24 hrs.  *Respond to all counter-offers w/in 24 hrs.  *Communicate with sellers via weekly phone call  *Take 1 new listings per week  *Meet with 2 sellers per week  *Set 3 listing meetings per week  *Master listing dialogue  *Follow up on all seller leads w/in 12 hrs  *Call 100+ residents in farm area/week  *Call 50+ Expired listings/week  *Call 200+ neighbors around Just Sold properties/week  *Attend all listing related training  *Attend all weekly staff meetings  *Review performance with T/L weekly

## BUYER SPECIALIST

Knowledge	Skills	Dispositions	Performance Standards
Sales Contracts Sales Addenda R/E Finance Buyer Process Pricing Geographic Area MLS Software	Communication Conversation Negotiation Strategic Analysis Computer Calculator	<b>Intellectual:</b> Intelligence Analysis Skills Judgment Decision Making Conceptual Ability Creativity Pragmatism Education <b>Personal:</b> Integrity Organization Planning Charm Self-Awareness Energy Enthusiasm Independence <b>Interpersonal:</b> First Impression Likability Listening Team Player Customer Focus Assertiveness Persuasion <b>Leadership:</b> Inspiration Ambition Goal Setting Accountable	*Attend all closings *Respond to all counter-offers w/in 24 hrs. *Communicate with buyers weekly *Write 1 offer/week *Attend 2 buyer meetings per week *Set 3 buyer meetings per week *Put all prospects through buyers process *Show homes to only "A" buyers *Master buyer dialogue *Follow up on all ad, & sign calls w/in 12 hrs. *Hold 1 open house/week *Call 50+ tenants in apartment complexes or move-up buyers/week *Visit 3+ FSBOs per week and follow up accordingly *Call 200+ neighbors around Just Listed properties per week *Attend all buyer related training *Attend all weekly staff meetings *Review performance with T/L weekly

## LISTING COORDINATOR

Knowledge	Skills	Dispositions	Performance Standards
<p>MLS Software MS Office Internet E-mail</p>	<p>Communication Computer Data Entry Filing</p>	<p><b>Intellectual:</b> Intelligence Decision Making Experience Education <b>Personal:</b> Integrity Organization Planning Independence Stress Management Energy <b>Interpersonal:</b> Customer Focus Team Player Listening <b>Leadership:</b> Goal Setting Accountable</p>	<p><b>Maintain Inventory:</b> 10 Pre-List Packages 10 Cons. Packages  <b>Out Within 24 hrs:</b> Pre-Listing Guide Letters/Notes Just Listed Cards Customer Survey Confirm Appt. Seller Surveys MLS Data Entry  <b>In Within 24 hrs:</b> HOA Info. Loan Payoff Info. Listing Feedback  <b>Contact W/in 24 hrs:</b> Showing Service Confirming Calls  <b>Weekly Contacts:</b> Pending Sellers Title Company  <b>Other:</b> *Attend all weekly staff meetings</p>

## CLOSING COORDINATOR

Knowledge	Skills	Dispositions	Performance Standards
<p>MLS Software MS Office Internet E-mail</p>	<p>Communication Computer Calculator Data Entry Filing</p>	<p><b>Intellectual:</b> Intelligence Decision Making Experience Education</p> <p><b>Personal:</b> Integrity Organization Independence Stress Management Energy</p> <p><b>Interpersonal:</b> Customer Focus Team Player Listening</p> <p><b>Leadership:</b> Goal Setting Accountable</p>	<p><b>Maintain Inventory:</b> 10 Buyer's Guides 10 Cons. Packages</p> <p><b>Out Within 24 hrs:</b> Letters/Notes Just Sold Cards Customer Survey Confirm Appt. Buyer Surveys</p> <p><b>In Within 48 hrs:</b> Inspections</p> <p><b>Contact W/in 24 hrs:</b> Home Inspector Showing Service Confirming Calls</p> <p><b>Weekly Contacts:</b> Pending Buyers Title Company Mortgage Co.</p> <p><b>Other:</b> *Attend all weekly staff meetings</p>

## MARKETING COORDINATOR

Knowledge	Skills	Dispositions	Performance Accountabilities
<p>MLS Software MS Office MS Publisher Internet E-mail</p>	<p>Communication Computer Writing</p>	<p><b>Intellectual:</b> Intelligence Decision Making Analysis Creativity Education</p> <p><b>Personal:</b> Integrity Planning Organization Independence Energy</p> <p><b>Interpersonal:</b> Team Player Likeability Listening Customer Focus Persuasion</p> <p><b>Leadership:</b> Goal Setting Accountable</p>	<p>Maintain lead generation call lists daily</p> <p>Deliver 33-touch, 16-touch, &amp; 8-in-8 on appropriate dates</p> <p>Order home flyers w/in 24 hrs.</p> <p>Update client database w/in 24 hrs.</p> <p>Update social networks w/in 24 hrs.</p> <p>Coordinate all weekend open houses by preceding Tuesday</p> <p>Mail neighborhood update cards monthly</p> <p>Attend weekly staff meetings</p>

## ADMINISTRATIVE ASSISTANT

Knowledge	Skills	Dispositions	Performance Accountabilities
Phones Fax Copier Internet E-mail	Communication Computer Phone	<b>Intellectual:</b> Intelligence <b>Personal:</b> Integrity Organization Planning Independence Stress Management Enthusiasm Energy <b>Interpersonal:</b> Likeability First Impressions Listening Customer Focus Team Player <b>Leadership:</b> Goal Setting Accountable	Update web site and check E-mail daily  Answer all calls w/in 3 rings  Mail appropriate letters and notes w/in 24 hrs.  Update voice message daily  Check and order supplies inventory weekly  Sort mail daily  Back up computer files weekly  Attend all weekly staff meetings



# RUNNER

Knowledge	Skills	Dispositions	Performance Accountabilities
Geographic Area	Communication Driving	<b>Intellectual:</b> Intelligence <b>Personal:</b> Integrity Organization Planning Independence Enthusiasm Energy <b>Interpersonal:</b> Likeability First Impressions Customer Focus Team Player <b>Leadership:</b> Goal Setting Accountable	Place/Remove signs & lockboxes w/in 24 hrs.  Measure rooms w/in 24 hrs.  Take pictures w/in 24 hrs.  Deliver contracts, flyers, & keys w/in 24 hrs.  Deliver pre-listing packages w/in 12 hrs.  Deliver new FSBO phone #'s to MC daily  Attend weekly staff meetings

## **PRE-SEARCH PREPARATION**

*Before searching for “talent”, you must be prepared!*

Once your **organizational evaluation** reveals a need to add and/or upgrade, you must properly **prepare** yourself for the hiring process.

### **Interviewing Tools**

1. Application Forms
2. Behavioral Assessment (Alessandra or DISC)
3. General Questions
4. Mission, Vision, Values, Beliefs, & Goals
5. Reference Review Forms
6. Position Specific Questions
7. Position Specific Tests/Evaluations
8. Win/Lose & Expectations
9. Staff Development Calendar
10. Training/Procedures Manual(s)
11. Compensation Package

**Assembling** (you don’t have to create anything) the above tools for an effective interview demonstrates you are **serious** about putting the right person in the right position for the right reasons.

# **FINDING TALENT**

*Typically, talent is not unemployed, looking for a job!*

Once you have assembled all of your interviewing tools, it's time to search for and **find** the talent you desire!

## **NOTE:**

There is a fundamental difference between finding and attracting talent!

**Finding** = Locating it

**Attracting** = Moving it into relationship with you

### **When locating talent, try the following places:**

1. Your Competition
2. Real Estate Schools
3. Network Sources (S.O.I.)
4. Allied Resources (Preferred Vendors)
5. Career Placement Services
6. Local Universities or Junior/Community Colleges
7. Advancement from within
8. Headhunter
9. Internet Job Sites
10. Newspaper

**HINT:** Ready or not, you should **ALWAYS** be on the lookout for talent!

# ATTRACTING TALENT

*Hiring a highly functional staff requires a three-part, 12-step system!*

Interview 1:	
1.	Application & Evaluation Forms
2.	Rapport & General Questions
3.	Your Story & Mission
4.	Reference Check
Interview 2:	
5.	Position Specific Questions
6.	Position Specific Test
7.	Reference Review
8.	Behavior Review
9.	Long-Term Career Vision
10.	Win/Lose & Mutual Expectations
Interview 3:	
11.	Dinner with Candidate and Spouse
12.	Informed & Intelligent Decision

This process is comprised of **12 interdependent steps**. One step alone does not confirm a successful candidate. You must stay into curiosity and assure each step **validates** the others!

During the entire hiring process you are on a “**red flag**” mission. Once a red flag appears, you must stay into curiosity until you are convinced the issue/concern has been resolved. Keep asking questions until you have a **clear** understanding of “what” the candidate is, “who” the candidate is, and “why” the candidate is. You are searching for people who share your values and beliefs. This will show up (or not) when you ask them to explain the decisions they’ve made in their lives.

**Note:** Don’t “fall in love” with the candidate; fall in love with the process. Simply put, you must have a **hiring system** that guarantees you hire the **right person** for each staff position.

# INTERVIEW ONE

## **1. APPLICATION FORMS:**

Before you meet with the candidate, have her complete the following forms in the conference room:

- 1. General Application**
- 2. Reference Sheet**
- 3. Job History**
- 4. Behavioral Assessment**

Have the receptionist greet the candidates and move them to the appropriate meeting room.

Let each candidate sit alone in the conference room while completing the forms. It should take the candidate approximately 30 minutes to complete all forms.

### **Receptionist script:**

*Hello (Name), (Your Name) is expecting you! This is where you will be meeting; so set your things down and make yourself at home. Before (Your Name) comes in, could you please take some time and complete these forms. If you have any questions please don't hesitate to open the door and ask me! When you are finished, just let me know and I will inform (Your Name). May I offer you something to drink? It would be my pleasure!*

## **GENERAL APPLICATION**

This form is for our personnel files and is strictly confidential.

### **PERSONAL:**

<hr/>			
Last Name	First	Middle	
<hr/>			
Home Address	City	State	Zip
<hr/>			
Social Security Number		Birth Date	
<hr/>		<hr/>	
Home Phone		E-mail Address	
<hr/>		<hr/>	

### **EDUCATION:**

<hr/>		<hr/>
High School	Graduation Date	
<hr/>		<hr/>
College	Major	Degree
<hr/>	<hr/>	<hr/>
College	Major	Degree
<hr/>	<hr/>	<hr/>
College	Major	Degree
<hr/>	<hr/>	<hr/>
<hr/>		
Awards/Recognitions Received		
<hr/>		

## **REFERENCES**

Please list five **personal** references we can contact within the next week.  
(Do not list previous or current employers.)

Personal References:		
Reference Name	Phone	Relationship
Reference Name	Phone	Relationship
Reference Name	Phone	Relationship
Reference Name	Phone	Relationship
Reference Name	Phone	Relationship
I give my permission to check references listed and others that they may refer.		
Signature		Date

## Employment History Form 1

Current/Most Recent Employer

Start Date

Final Date

Location

Type of Business

Title

Starting Salary

Final Salary

Responsibilities

Accomplishments

Lessons Learned

Most Enjoyable Moments/Activities

Least Enjoyable Moments/Activities

Reason for Leaving

Supervisors Name

Title

Phone Number

Permission to Contact?

Signature



## Employment History Form 2

Current/Most Recent Employer

Start Date

Final Date

Location

Type of Business

Title

Starting Salary

Final Salary

Responsibilities

Accomplishments

Lessons Learned

Most Enjoyable Moments/Activities

Least Enjoyable Moments/Activities

Reason for Leaving

Supervisors Name

Title

Phone Number

Permission to Contact?

Signature

## Employment History Form 3

Current/Most Recent Employer

Start Date

Final Date

Location

Type of Business

Title

Starting Salary

Final Salary

Responsibilities

Accomplishments

Lessons Learned

Most Enjoyable Moments/Activities

Least Enjoyable Moments/Activities

Reason for Leaving

Supervisors Name

Title

Phone Number

Permission to Contact?

Signature

## Employment History Form 4

Current/Most Recent Employer

Start Date

Final Date

Location

Type of Business

Title

Starting Salary

Final Salary

Responsibilities

Accomplishments

Lessons Learned

Most Enjoyable Moments/Activities

Least Enjoyable Moments/Activities

Reason for Leaving

Supervisors Name

Title

Phone Number

Permission to Contact?

Signature

## Employment History Form 5

Current/Most Recent Employer

Start Date

Final Date

Location

Type of Business

Title

Starting Salary

Final Salary

Responsibilities

Accomplishments

Lessons Learned

Most Enjoyable Moments/Activities

Least Enjoyable Moments/Activities

Reason for Leaving

Supervisors Name

Title

Phone Number

Permission to Contact?

Signature

## 2. RAPPORT/GENERAL QUESTIONS:

When you first enter the conference room both parties are a little nervous so it's important to "break the ice"!

### Basic Introduction

*Hi! I'm \_\_\_(Your Name)\_, it's a pleasure meeting you! Did you have any problems finding the office? It's kind of warm, wet, cold, nice, etc., out there isn't it?*

After you have introduced yourself, inform the candidate of your approach to hiring and intentions with meeting # 1.

### Setting the stage dialogue:

*I want you to understand that I am extremely serious when it comes to adding people to our team! My goal is to form win-win relationships with the people I associate with as I feel only good things can come from those types of relationships! Would you agree? Great! My approach to hiring is a three interview approach so what I would like to do today is simply get to know as much about you as I can and also tell you a little about me. Most of our meeting today will consist of me asking you questions and then listening to your answers. I hope you don't mind if I take notes? Today there are no right or wrong answers and I want you to know that what gets said in here remains in here! Therefore I want you to be as open and as honest with me as you feel you can be! Is that fair? Great!*

**NOTE:** Review employment history forms with candidate in addition to asking general questions.

## **GENERAL QUESTION**

*All Candidates*

1. Tell me about you. Family? Recreation? Hobbies? (Rapport) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
2. What formal education or seminars have you participated in? When?  
(Education) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
3. Describe your reading habits. What is the best book you've read in the  
past 12 months? Why? (Education) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
4. Describe a complex situation in which you had to learn a lot quickly.  
How did you go about learning and how successful were the outcomes?  
(Intelligence) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
5. Are you computer literate? Describe the programs you are **extremely  
capable in.** (Technology) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
6. Looking back in your career, what were your most and least successful  
jobs? (Track Record) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

7. Describe a situation when the temptation to compromise your integrity was the strongest you've ever felt. (Integrity) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
8. What kind of people do you enjoy working with? (Team Player) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
9. Do you want to work as part of team or own your own? (Team Player) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
10. There are people who don't succeed in jobs. Why do you think people fail? (Values) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
11. How will your references describe your work habits? (Energy) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
12. What are a couple of the best and worst decisions you've made in recent years? (Self-Awareness) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
13. How have you changed during recent years? (Adaptability) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

14. How many hours per week have you worked, on the average, during the past year? (Energy)\_\_\_\_\_
15. What motivates you? (Commitment)\_\_\_\_\_
16. How do you motivate yourself to do something really well that you don't like to do? (Commitment)\_\_\_\_\_
17. How much money do you need to be making in 12 months? 3 years? 5 years? (Ambition)\_\_\_\_\_
18. What values do you live by? (Values)\_\_\_\_\_
19. How satisfied are you with your balance in life? (Balance)\_\_\_\_\_
20. Do you believe in goal setting and planning? Why? Are your goals written down? Why? (Goal Setting)\_\_\_\_\_



21. What are examples of the biggest challenges you have faced and overcome? (Endurance) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
22. How much supervision do you want and need? (Independence) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
23. If you were to arrange confidential reference calls with some of your past supervisors, what is your best guess as to what they would generally agree are your strengths and areas for improvement? (Self-Awareness) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
24. How much feedback do you like to get from people you report to, and in what form (written, face to face)? (Accountable) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
25. What is the vision of your “perfect” job? (Needs) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
26. What is the one thing you are most proud of? Why? (Values) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**NOTE:**

Once answered, the above questions may require follow-up questions. The key is to stay into curiosity until you have a complete and thorough understanding for what is being asked.

### 3. YOUR STORY & MISSION:

Once you've asked the final general question, **and want to continue**, it's time to reciprocate and tell the candidate some things about you.

Remember it's a value for value proposition! Therefore, the purpose of your story is to reveal you have character, strength, success, perseverance, integrity, and values. You want candidates to self-discover that being in business with someone like you will add value to their career and life!

Tell your story in chronological order. Thus, your story should lead right into your current situation. This makes the perfect place to share your company mission, vision, values, beliefs, and goals with candidates, as well as describing for them where you see yourself and your team in the future.

#### A Quick Reminder:

Mission	⇒	The purpose or intent of your business
Vision	⇒	The image of your business fulfilling its purpose
Values	⇒	What you and your business stand for
Beliefs	⇒	The basic business rules you and associates will follow
Goals	⇒	The key benchmarks you expect to achieve

You should also provide each candidate with a brief explanation of your organizational structure and how each position is strategically designed to fulfill the team mission.

#### Transitional phrase:

*Now that I feel I know a lot about you, I think it's only fair that I tell you a little about me.*

## **ENDING MEETING ONE**

*You can end meeting one at any point you feel there will not be a match!*

If you decide to end the meeting early or decide the candidate **will not** be a good fit for your team, then have the following dialogue:

### **Candidate shows no promise:**

*I really appreciate you coming in today! Again, my purpose with meeting one is simply to put a name with a face and ask a few questions. I will be contacting the top three candidates for a second meeting sometime next week. Thanks and again it was a pleasure meeting you!*

If you decide the candidate is a good fit for your team and want to proceed, then have then end the meeting with the following dialogue:

### **Candidate shows promise:**

*It was a pleasure meeting with you today. What I would like to do now is take some time to check your references and study your behavior assessment. Would you be open to contacting your previous supervisors and arranging a confidential phone interview for me? Simply give them each a call and set a time for me to contact them at home, preferably this (or next) weekend. (Schedule a date and time to confirm they have made the appointments.) I am also going to be visiting with other candidates throughout the week and I will give the top three candidates a call on (date) to schedule a follow-up meeting at which time we will discuss the job thoroughly. Is that fair? Again, it was a pleasure meeting with you and I look forward to speaking with you soon!*

**NOTE:** When hiring someone with real estate sales experience, always ask for past client references.

#### 4. REFERENCE CHECK:

Call all five personal references and all employment references that were authorized.

**NOTE:** “Asking for reference information is perfectly legal, giving out false or malicious information is illegal, and withholding certain negative reference information can be illegal.” Bradford Smart (TopGrading)

#### PERSONAL REFERENCE CHECK

*Hi, my name is (Your Name) and I was given your name by (Candidate's Name) as a personal reference and would like to ask you a few questions.*

\_\_\_\_\_  
Candidates Name

\_\_\_\_\_  
Reference Name

\_\_\_\_\_  
Relationship

\_\_\_\_\_  
Time Known

\_\_\_\_\_  
Personal Strengths/Things you Like and Respect

\_\_\_\_\_  
Personal Weaknesses/Areas of Improvement

\_\_\_\_\_  
Best Way to Manage/Lead

\_\_\_\_\_  
Do you know of anyone else who might have some insight?

## EMPLOYMENT REFERENCE CHECK (page 1 of 2)

*Hi, (Their Name), I really appreciate you taking my call. As (Candidate's Name) told you, I am considering him/her for employment and would like to hear some of your comments. Know the source of any comment today will remain highly confidential so I would like you to be as open and honest with me as you feel you can be! Is that fair?*

*Great. First, let me verify a few things:*

\_\_\_\_\_  
Start Date

\_\_\_\_\_  
End Date

\_\_\_\_\_  
Title

\_\_\_\_\_  
Salary

\_\_\_\_\_  
Duties/Responsibilities

What would you consider (Candidate)'s strengths to be? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What would you consider (Candidate)'s weaknesses or areas of improvement to be? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

On a scale from 1 – 10, with 10 being exceptional and 1 being poor, how would you rate (Candidate)'s overall job performance? What would have made it a 10(+)? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

## EMPLOYMENT REFERENCE CHECK (page 2 of 2)

*Next, let me share with you the job description for the position (Candidate) is applying for. (Select most vital activities from job description.)*

How do you think (Candidate) would fit in that job? \_\_\_\_\_

---

---

---

Is there anything in the job description that concerns you? \_\_\_\_\_

---

---

---

How can I best manage/lead (Candidate)? \_\_\_\_\_

---

---

---

Anything else I should know about (Candidate)? \_\_\_\_\_

---

---

---

*I really appreciate you spending time with me today. Your information has been most helpful.*

**NOTE:** No manager is legally required to accept a reference call.

## **INTERVIEW TWO**

Once **all** references have been checked and behavior has been assessed, invite the top three candidates back for a second interview. Also call all others whom you are not inviting back to inform them they will not be moving forward.

### **Phone call to top three candidates:**

*Hi (Candidate), this is (Your Name). Congratulations, you made the cut! I would like to meet with you again on (Date), from (time) to (time).  
(Approximately 3 hours) Thanks and I'm really looking forward to our visit!*

### **Phone call to all others:**

*Hi (Candidate), this is (Your Name). I first want to say it was a pleasure spending time with you last week! We have made a decision regarding the position and have decided to go with someone else. I wish you all the best in the future and again I'm glad to have met you!*

Set the agenda at the beginning of interview # 2 with the following dialogue:

### **Meeting two opening dialogue:**

*Hi, (Candidate), it's great to see you again. In today's meeting we are going to get job specific. I am first going to start with, you guessed it, more questions. Then we will review your references' comments and your behavior graph. Finally, we will talk about mutual expectations and the job itself. Sound good? Again, there are no right or wrong answers, only your answers. I will again ask you to be as open and honest with me as you feel you can be! Are you ready to get started? Great!*

Continue with Position Specific Questions

**5. POSITION SPECIFIC QUESTIONS:**

Following are **comprehensive questions** designed to uncover desired competencies for each position. These questions should simply be used to get the momentum ball rolling. Candidate responses can (and probably will) initiate the need for follow-up questions.

**REMEMBER:** Stay into curiosity until you are **completely** satisfied that each question has been answered in full. The more specific the question, the better understanding you will gain.

**Important Note:**



The comprehensive questions to follow were inspired by the book *TopGrading*. A fantastic book written by Dr. Bradford Smart and a **must read** for anyone wanting to master the art and science of hiring talent.

## **COMPREHENSIVE QUESTIONS**

*Listing Specialist*

1. What is the most difficult or challenging decision you have made recently? (Decision Making) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
2. What are the biggest risks you've taken in recent years? (Risk Taking) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
3. What are examples of circumstances in which you were expected to do a certain thing and, on your own, went beyond the call of duty? (Initiative) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
4. How well organized are you? What do you do to be organized and what do you feel you need to do to be better organized? (Organization) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. Everyone procrastinates at times. What are the kinds of things that you procrastinate on? (Planning)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
6. Have you intentionally progressed in recent years? Explain how you did it – your approach, the problems your encounters, the outcomes. (Excellence)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
7. How do you handle yourself under stress and pressure? (Stress Mgt.)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
8. What sort of first impression do you think you make? Why? (First Impression)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
9. Tell me about a situation in which you were expected to work with a person you disliked. (Likability)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
10. How would you define the term “active listening”? How often and how effectively have you used active listening? (Listening)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

11. What would your past clients tell me are your strengths and areas of improvement? (Customer Focus) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
12. Describe your methods for diagnosing others' needs. (Customer Focus) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
13. When there is a difference of opinion, do you tend to confront people directly, indirectly, or tend to let the situation resolve itself? (Assertiveness)\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
14. Tell me about your real estate career (experience, production, methods) (Initiative)\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
15. How would you rate yourself in public speaking? If we had a videotape of your most recent presentation, what would we see? (Communication)\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
16. Describe situations in which your negotiating skills proved effective and ineffective. (Negotiation)\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

17. Describe a situation in which you were most effective in selling an idea or yourself. (Persuasion)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
18. Are you a natural leader? Give examples of when people directly followed your lead and when they did not? (Followership)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
19. What is the toughest situation you've ever overcome? (Endurance)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
20. How mentally tough will your references say you are? Why? (Endurance)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
21. How would you rate your charisma? Why? (Enthusiasm)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
22. How would you rate your listing skills? Why? (skills)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

23. Is there anything I should have asked you but didn't? \_\_\_\_\_

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## **COMPREHENSIVE QUESTIONS**

*Buyer Specialist*

1. What is the most difficult or challenging decision you have made recently? (Decision Making) \_\_\_\_\_

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2. What are the biggest risks you've taken in recent years? (Risk Taking) \_\_\_\_\_

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3. What are examples of circumstances in which you were expected to do a certain thing and, on your own, went beyond the call of duty? (Initiative) \_\_\_\_\_

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4. How well organized are you? What do you do to be organized and what do you feel you need to do to be better organized? (Organization) \_\_\_\_\_

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5. Everyone procrastinates at times. What are the kinds of things that you procrastinate on? (Planning)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
6. Have you intentionally progressed in recent years? Explain how you did it – your approach, the problems your encounters, the outcomes. (Excellence)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
7. How do you handle yourself under stress and pressure? (Stress Mgt.)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
8. What sort of first impression do you think you make? Why? (First Impression)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
9. Tell me about a situation in which you were expected to work with a person you disliked. (Likability)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
10. How would you define the term “active listening”? How often and how effectively have you used active listening? (Listening)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

11. What would your past clients tell me are your strengths and areas of improvement? (Customer Focus) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
12. Describe your methods for diagnosing others' needs. (Customer Focus) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
13. When there is a difference of opinion, do you tend to confront people directly, indirectly, or tend to let the situation resolve itself? (Assertiveness)\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
14. Tell me about your real estate career (experience, production, methods) (Initiative)\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
15. How would you rate yourself in public speaking? If we had a videotape of your most recent presentation, what would we see? (Communication)\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
16. Describe situations in which your negotiating skills proved effective and ineffective. (Negotiation)\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

17. Describe a situation in which you were most effective in selling an idea or yourself. (Persuasion)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
18. Are you a natural leader? Give examples of when people directly followed your lead and when they did not? (Followership)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
19. What is the toughest situation you've ever overcome? (Endurance)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
20. How mentally tough will your references say you are? Why? (Endurance)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
21. How would you rate your charisma? Why? (Enthusiasm)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
22. How would you rate your listing skills? Why? (skills)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_



23. Is there anything I should have asked you but didn't? \_\_\_\_\_

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## **COMPREHENSIVE QUESTIONS**

*Transaction Coordinator (Listing and Closing)*

1. Do you consider yourself detailed oriented (perfectionist)? Why? (Behavior)\_\_\_

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2. How do you think your references rated your computer proficiency? (Self Awareness)\_\_\_\_\_

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3. Are you better at managing a lot of things simultaneously or focusing on a few? (Organization)\_\_\_\_\_

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4. How well organized are you? What do you do to be organized? What do you feel you should do to be better organized? (Organization)\_\_\_\_\_

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5. Everyone procrastinates at times. What are the kinds of things that you procrastinate on? (Planning)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
6. How do you think your former employers described your strengths and weaker points with respect to personal organization, attention to detail and planning? (Organization/Planning)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
7. Give me some examples in your prior jobs of your going beyond what was normally expected to enhance your company's reputation or image. (Customer Focus)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
8. Do you believe in asking for forgiveness rather than permission or do you wait for your supervisor's full approval before you act? (Independence)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
9. How do you handle yourself under stress and pressure? (Stress Management)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
10. When were you so frustrated that you didn't treat someone with respect? (Likability)\_\_\_\_\_
- \_\_\_\_\_

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11. How will you describe your level of assertiveness? (Assertiveness)\_\_\_\_\_

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12. Give me some examples in your prior jobs of your going beyond what was normally expected to enhance your company's reputation or image. (Initiative)\_\_\_\_\_

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13. How would you define the term "active listening"? Give me a couple of examples where you have used active listening. (Listening)\_\_\_\_\_

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14. How would you rate your overall data entry abilities? Why? (Experience)\_\_\_\_\_

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15. How would you rate your abilities to communicate both verbally and in writing? (Communication)\_\_\_\_\_

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16. Is there anything that I should have asked you but didn't? \_\_\_\_\_

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## **COMPREHENSIVE QUESTIONS**

### *Marketing Coordinator*

1. Do you consider yourself detailed oriented (perfectionist)? Why? (Behavior)\_\_\_

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2. Are you better at managing a lot of things simultaneously or focusing on a few? (Organization)\_\_\_\_\_

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3. How well organized are you? What do you do to be organized? What do you feel you should do to be better organized? (Organization)\_\_\_\_\_

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4. What is the most difficult or challenging decision you have made recently? (Decision Making)\_\_\_\_\_

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5. Everyone procrastinates at times. What are the kinds of things that you procrastinate on? (Planning)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
6. How creative are you? Give an example of your creativity. (Creativity)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
7. In the past year, what have specifically have you done to remain knowledgeable about the real estate market and industry, agent challenges, technology, and trends? (Analysis Skills)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
8. How do you think your former employers described your strengths and weaker points with respect to personal organization, attention to detail and planning? (Organization/Planning)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
9. Do you believe in asking for forgiveness rather than permission or do you wait for your supervisor's full approval before you act? (Independence)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

10. How do you handle yourself under stress and pressure? (Stress Management)\_\_\_\_\_

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11. When were you so frustrated that you didn't treat someone with respect?  
(Likability)\_\_\_\_\_

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12. How would you define the term "active listening"? How often and how  
effectively have you used active listening? (Listening)\_\_\_\_\_

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13. How will you describe your level of assertiveness? (Assertiveness)\_\_\_\_\_

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14. Give me some examples in your prior jobs of your going beyond what  
was normally expected to enhance your company's reputation or image.  
(Initiative)\_\_\_\_\_

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15. How would you rate your overall marketing abilities? Why? (Experience)\_\_\_\_\_

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16. Describe a situation in which you were most effective in selling an idea or yourself. (Persuasion)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
17. How would you rate your abilities to communicate both verbally and in writing? (Communication)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
18. Is there anything that I should have asked you but didn't?\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## **COMPREHENSIVE QUESTIONS**

*Administrative Assistant*

1. Do you consider yourself detailed oriented (perfectionist)? Why? (Behavior)\_\_\_

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2. How do you think your references rated your computer and phone proficiency? (Self Awareness)\_\_\_\_\_

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3. Are you better at managing a lot of things simultaneously or focusing on a few? (Organization)\_\_\_\_\_

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4. How well organized are you? What do you do to be organized? What do you feel you should do to be better organized? (Organization)\_\_\_\_\_

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5. Everyone procrastinates at times. What are the kinds of things that you procrastinate on? (Planning)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
6. How do you think your former employers described your strengths and weaker points with respect to personal organization, attention to detail and planning? (Organization/Planning)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
7. Do you believe in asking for forgiveness rather than permission or do you wait for your supervisor's full approval before you act? (Independence)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
8. How do you handle yourself under stress and pressure? (Stress Management)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
9. When were you so frustrated that you didn't treat someone with respect? (Likability)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
10. What sort of first impression do you think you make? Why? (First Impression) \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

11. How would you define the term “active listening”? Give me a couple of examples where you have used active listening. (Listening)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
12. Give me some examples in your prior jobs of your going beyond what was normally expected to enhance your company’s reputation or image. (Customer Focus)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
13. How do you think your references rated your enthusiasm? Why? (Enthusiasm)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
14. How would you rate your abilities to communicate both verbally and in writing? (Communication)\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
15. Is there anything that I should have asked you but didn’t?\_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## **COMPREHENSIVE QUESTIONS**

*Runner*

1. How well organized are you? What do you do to be organized? What do you feel you should do to be better organized? (Organization)\_\_\_\_\_
2. Everyone procrastinates at times. What are the kinds of things that you procrastinate on? (Planning)\_\_\_\_\_
3. How do you think your former employers described your strengths and weaker points with respect to personal organization and attention to detail? Why? (Organization/Planning)\_\_\_\_\_
4. Do you believe in asking for forgiveness rather than permission or do you wait for your supervisor's full approval before you act? (Independence)\_\_\_\_\_

5. When were you so frustrated that you didn't treat someone with respect?  
(Likability)\_\_\_\_\_
6. What sort of first impression do you think you make? Why? (First Impression) \_
7. Give me some examples in your prior jobs of your going beyond what was normally expected to enhance your company's reputation or image.  
(Customer Focus)\_\_\_\_\_
8. How do you think your references rated your enthusiasm? Why?  
(Enthusiasm)\_\_\_\_\_
9. How many blemishes are on your driving record? (Experience)\_\_\_\_\_
10. How would you rate your communication skills? Why? (Communication)\_\_\_\_\_

11. Is there anything that I should have asked you but didn't? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

## 6. POSITION SPECIFIC TESTS

You must be sure the candidate possesses the knowledge and skills necessary to succeed in the position. This can be accomplished with a position and/or task specific test.

Simply pick the most important activity or activities of the position and create a test that proves or disproves the candidate's capabilities.

### Appropriate Position Specific Tests Include:

Make a 15-minute presentation (Listing Specialist; Buyer Specialist).

Answer these contract questions (Listing Specialist; Buyer Specialist).

Demonstrate your computer skills (Transaction Coordinators).

Demonstrate your phone skills (Administrative Assistant).

## **7. REFERENCE REVIEW:**

After the position specific test(s), take a short break. Have a pre-prepared flip chart page, like the one below, summarizing important reference remarks. Tape page to the wall and review remarks with the candidate. (Keep the sources of remarks confidential.)

**Example:**

### **Reference Remarks**



If the candidate's behavior is congruent with the way they responded to earlier questions and is validated by what their references said, then move to step nine.

If their behavior graphs to be different from the way they responded to earlier questions or to what their references said, then **validate** the behavior assessment as shown below.

### **Validating the Behavioral Assessment:**

*In question # 1 you said you were easy to get to know personally in business or in unfamiliar social environments. What did you mean by that?*

*Give me a specific example of how you've demonstrated this in your business life.*

*Give me a specific example of how you've demonstrated this in your personal life.*

**Repeat above questions for each response on the behavioral assessment.**

**NOTE:** After validating the behavioral assessment, it will be **obvious** whether the candidate possesses the preferred behavioral style for the position.

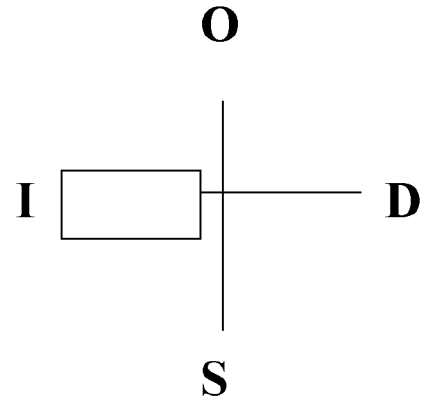
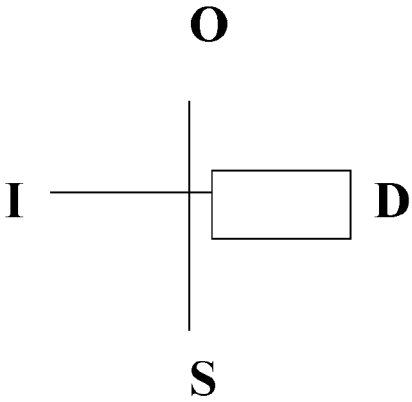
### **PREFERRED BEHAVIORAL STYLES**

Alessandra Graph

**Listing Specialist:**

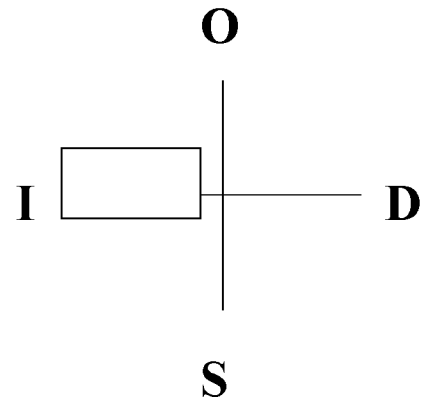
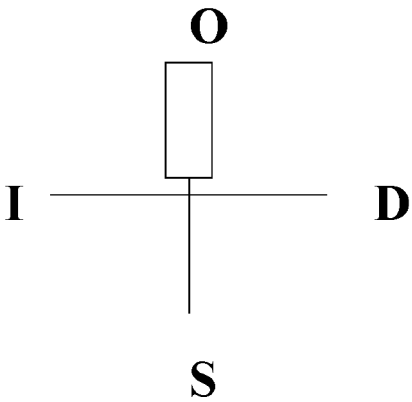
**Listing Coordinator:**





**Buyer Specialist:**

**Closing Coordinator:**

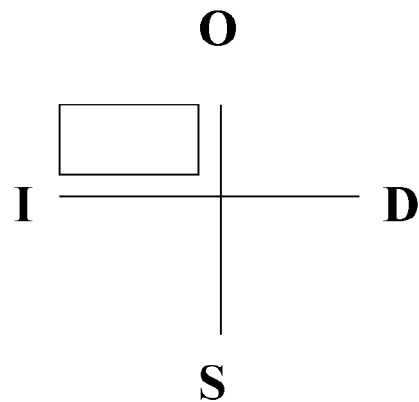
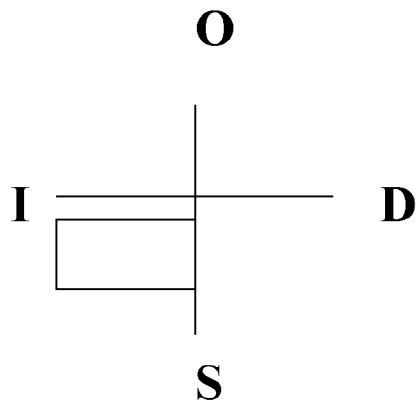


## PREFERRED BEHAVIORAL STYLES

Alessandra Graph

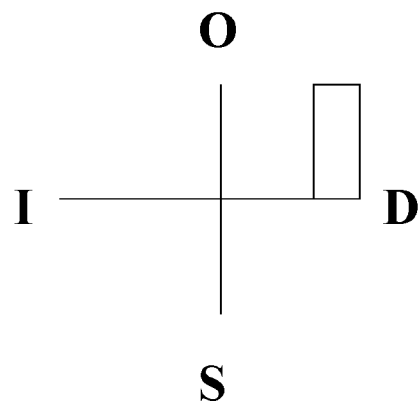
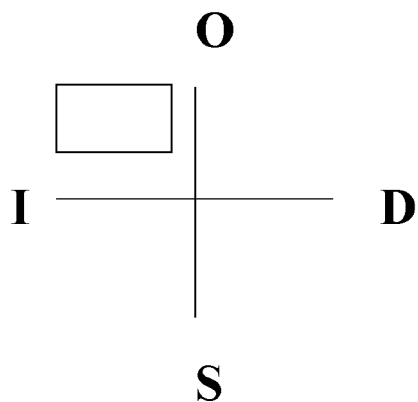
**Marketing Coordinator:**

**Runner:**



**Administrative Assistant:**

**Team Leader:**



## 9. LONG-TERM CAREER VISION

Once **you** are convinced the candidate is the right person for the right position, you should get a feel for their **long-term career aspirations**.

### Long-Term Career Vision Questions:

Career wise, where would you like to be in five years?

What's important to you about accomplishing that?

**Or**

What do you hope to accomplish with your career over the next five years?

What's important to you about accomplishing that?

**REMEMBER:** You are interested in a long-term working relationship, not a short-term employment fix.

## **10. WIN/LOSE & MUTUAL EXPECTATIONS**

The win/lose & mutual expectations conversation verifies that everyone is on the same page. It also allows the relationship to get off to the best start possible.

### **Transitional Dialogue:**

*Let's switch gears for a moment. It's been my experience that conflict only arises when expectations differ! Would you agree?*



### Win/Lose Dialogue:

*Great, with that in mind...*

*...how does someone win with you?*

*How does someone lose with you?* (Write answers on, “Your Opinions Matter”.)

*Let me share with you how someone wins and loses with me...*

(Hand candidate the sheet defining how someone wins & loses with you.)



### Expect From You Dialogue:

*What do you feel I have the right to expect from you as a member of the team?* (Write answers on, “Your Opinions Matter”.)

*Let me share with you what I feel I have the right to expect from you...*

(Hand candidate the sheet covered earlier titled: “What I expect from you”.)



### Expect From Me Dialogue:

*What do you feel you have the right to expect from me as your team leader?* (Write answers on, “Your Opinions Matter”.)

*Let me share with you what I feel you have the right to expect from me...*

(Hand candidate the sheet covered earlier titled: “What you can expect from me”.)

## YOUR OPINIONS MATTER

### HOW DOES SOMEONE WIN AND LOSE WITH YOU?

WIN	LOSE
1.	1.
2.	2.

3.	3.
4.	4.
5.	5.

What do you feel I have the right to expect from you as a member of our team?
1.
2.
3.
4.
5.

What do you feel you have the right to expect from me as the owner?
1.
2.
3.
4.
5.

## **WIN/LOSE**

You Win with (Your Name) by:
1. (Fill in your wins) _____
2. _____

3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### **You Lose with (Your Name) by:**

1. (Fill in your losses) \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

## **EXPECTATIONS**

### **What I Expect From You as (Job Title)**

- ☐ Stay positive, high-minded and learning based
- ☐ Notify me immediately if your needs are not being met

- ☐ Perform to the standards of the job description (Review)
- ☐ Remain accountable to the defined performance standards
- ☐ Show up
- ☐ Show up on time
- ☐ Communicate with me openly and honestly
- ☐ Dress professionally
- ☐ Stay committed to achieving your goals

### **What You Can Expect of Me as the Team Leader**

- ☐ Always maintain a win-win relationship...with me it's win-win or no deal
- ☐ Maintain a high-minded, learning-based, productivity-specific environment
- ☐ Provide you with high-level training on a consistent basis
- ☐ Provide you with accountability and/or consulting on a consistent basis (Review development plan and training manual)
- ☐ Compensate you in a win-win fashion (Review compensation)
- ☐ Share office profits with you (After six months)
- ☐ Communicate with you openly and honestly

## **STAFF DEVELOPMENT CALENDAR**

Talented candidates want and expect to be fully developed so they can perform at high levels. Therefore, you must demonstrate your willingness to develop them by sharing a well thought out and meaningful training and development calendar.

Sample Training Calendar & Agenda:		
TOPIC	DATE	TIME
1. Answering phones	Monday, June 28	8:00 – 8:30
2. Phone Systems	Monday, June 28	8:30 – 9:30
3. Greeting Guests	Monday, June 28	9:45 – 10:00
4. Mail, Fax, Email	Tuesday, June 29	8:00 – 8:45
5. etc...		
6.		
7.		
8.		
9.		
10.		
11.		

**Note:** A three-month training calendar is recommended with the first session revolving around priority #1. You should also have assembled a step-by-step procedures manual for the position. Think of this as an “owner’s manual” for the position. If you don’t have one, simply have the trainee create it as they are being trained.

## **COMPENSATION MODELS**

*Compensation is the way you say, thank you...job well done!*

**There’s only one rule when it comes to compensation...win-win!**

The best models motivate employees to excel and allow everyone to share in the growth and success of the office.



**Staff compensation options include:**

- Straight Salary
- Salary plus Profit Sharing
- Salary plus Performance Bonus
- Straight Commission
- Draw plus Commission

**Other benefits include:**

- 401K with Matching
- Health Insurance
- Disability Insurance
- Continuing Education
- Gym Memberships
- Vacation Time
- Personal Days Off

**Teambuilding Functions Include:**

- Family Picnics
- Movie Nights
- Holiday Parties
- Goal Setting Retreats

## **ENDING INTERVIEW TWO**

*Hiring the right person requires extra time, energy, and effort!*

If you decide to end the meeting early or determine the candidate **will not** be a good fit for your team then have the following dialogue:

**If candidate shows no promise:**

*I really appreciate you meeting with me today. In fairness to the other candidates, I would like to meet with them before deciding the two who will be moving on the final phase of the process.*

*Again, thanks for your time today and I will call you as soon as my decision has been made.*

If you decide the candidate is a **good fit** for your team and want to proceed to the final interview then end interview two with the following dialogue:

**If candidate shows promise:**

*I really appreciate you meeting with me today and I definitely feel we have the makings of a win-win relationship. Would you agree?*

*Great. There's one more thing I'd like to do before making a final decision. I would like to invite you and your wife (family) to dinner this week so we can talk in less formal surroundings. (Set date).*

*Again, thanks for your time today and I look forward to meeting your wife (family).*

## **INTERVIEW THREE**

### **11. DINNER WITH CANDIDATE & SPOUSE:**

The last step before making a final decision is to invite each of the remaining candidates, along with their spouse (and kids), to dinner.

Going to dinner gives you an opportunity to meet the family and gauge the candidate's behavior in a social setting.

It also allows you to assess whether the candidate resides in a supportive and stable home environment, which is vital to long-term career success.

For candidates you are considering in leadership positions, pay close attention to their children's behavior. Doing so will give you a lot of insight on the candidate's leadership abilities.

**REMEMBER:** Keep the dinner conversation light and pay close attention to the candidate's demeanor and behavior. You are still in heavy evaluation mode!

## **12. OFFER POSITION:**

*Closing is the beginning of a win-win relationship!*

Once you are convinced you have the right person in the right position for the right reasons, call both candidates to share the news.

**Phone call to offer the position:**

*First let me say that I really appreciate you going through my lengthy hiring process. As you can now attest, I take adding members to our team very seriously.*

*After careful consideration, I am pleased to say that I would love for you to be part of our team and would like to formally offer you the position.*

**If candidate agrees then:**

*Great, let's get together tomorrow so we can tie up some loose ends and pick a start date.*

**Phone call to other candidate:**

*First let me say that I really appreciate you going through my lengthy hiring process. As you can now attest, I take adding members to our team very seriously.*

*After careful consideration, I have decided to go with someone else. This in no way means you are not qualified. I simply feel the other candidate is a better fit for the position.*

**NOTE:** If candidate wants to know specifics, then be completely honest with your answers.

**NOW WHAT**

*A happy staff is one that's in the right positions and productive!*

Once you make the hire, it's imperative that your new team member has **positional**:

**Direction** – Consulting

**Knowledge** – Training

**Ability** – Training

**Focus** – Accountability



**TRUTH:** A highly functional staff requires a **complete** staff development program. You **owe** team members the opportunity to succeed in their positions.

# **DEVELOPING A GREAT STAFF**

*Microdevelop so you don't have to micromanage!*

Since there are only eight key staff positions, you must work diligently to **create** leaders and not technicians.

## **Think of it this Way**



The person who fills each position must take **complete** ownership of the mission and vision for that position. Furthermore, they must fully understand how their position relates to the overall mission and vision of the office.

### **Place all newly hired staff members in a 90-day probationary program**

It's during this period that you will fully develop new team members and they will **earn** the right to **own the position**.

Your expectation is that each team member is going to consistently work to improve the systems and strategies being used in the position. Thus, each staff member must make a personal commitment to mastery. To study and practice with the specific intent of getting better.

To assure this happens, you must promote a model of mastery **and change**. Staff members who reject mastery should be replaced immediately as they will prevent the team from

**Bottom Line:** You need team members to take complete ownership of their position and then work diligently to make the position better.

*You Can't Teach a Kid to  
Ride a Bike at a Seminar!*

David Sandler